Release 2.17.2

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

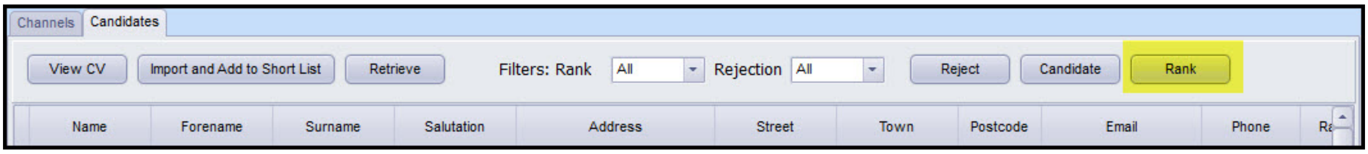
Ability create a credit note directly from an invoice

When crediting an invoice, there may be times when the underlying Company - Accounts settings have changed in the intervening time. This can cause accounting errors in crediting the invoiced amount. Therefore, an alternative approach has been added whereby the credit note is credited by creating a negative of the original invoice. Replacement timesheets can be included in the process.

Direct Link from IQX to Broadbean

A new way of accessing Broadbean directly from within the IQX Broadbean view has been added.

A new Rank button has been added in the Broadbean IQX view.



Once a vacancy has been posted to Broadbean and candidates have applied for a position Users have passwordless access the vacancy in Broadbean via the Rank button.
Then users can pull through candidates into the Broadbean IQX view.

This requires System Administrator setup.

Broadbean - Auto retrieval of all applications

A new General Setting has been added to exploit the ability to download Broadbean applications to the Broadbean view, in the past x days. This is not to import or shortlist the candidates, just retrieve their application into the Broadbean IQX form.

An xml job will import current candidate applications from Broadbean into the IQX Broadbean view based on the number of days offset from the current date.

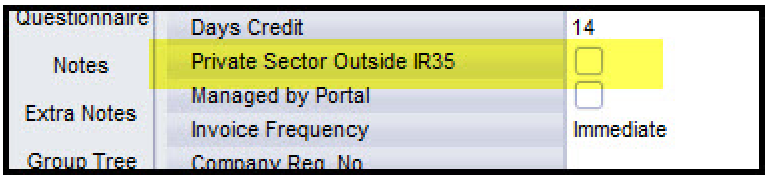
The job will populate the relevant Broadbean vacancy/candidate view (pulling down the CV, email body and xml format), for review by the User.

This job does not automatically import applicants into person records.

This requires System Administrator setup.

Method of identifying Private Sector Companies re IR35

A new tick box had been added to both versions of Company - Miscellaneous 'Private Sector outside IR35' to enable agencies to identify which companies are Exempt from the Public Company IR35 regulations.

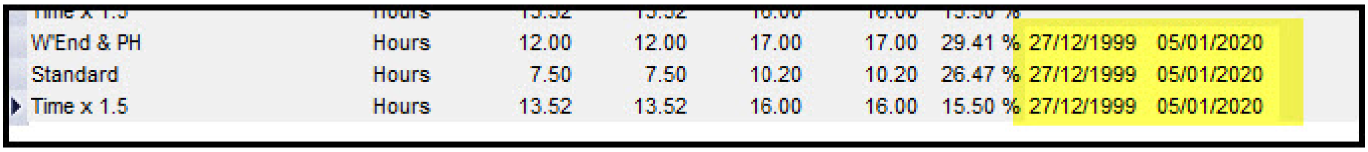


Also, a User role has been added Can override Public Sector client. This enables a user to edit 'Override IR35 Public Sector' tick boxes in Placement - top right window and Vacancy - Misc. Payroll transfer will need to be amended to use these settings according to the end payroll requirement.

Enforce 'end of week' rate dates in Rate Schemes

Rate Scheme start and end dates are not used in timesheet calculation by the day but by the week the day falls in. Therefore, days set in the Start/End date columns for each rate will default to the beginning or end of the week the date entered falls in, depending on which rate scheme start or end column is used.

This change affects Maintenance - Temps Setup Rate Scheme (expand) and Vacancy/Placement - Rates.



Extra columns to Rate Schemes

Three additional columns can now be added to rate schemes (not for invoice processing) to allow agencies to record additional information as required by their clients.

Beyond ExtraCode3 three extra columns can be added ExtraRate 1, 2 and 3 with soft headers for Terminology.

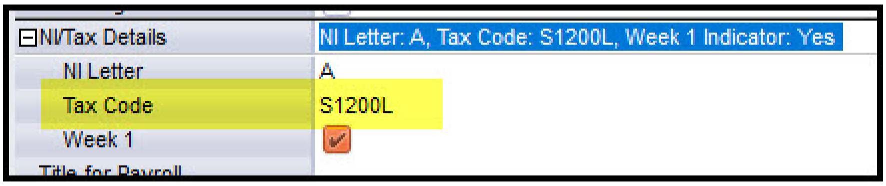
Requires System Administrator setup.

Auditing of individual rates on Vacancy and Placement

Changes to rates in Vacancies and Placements are now audited with a list of all the previous and changed rates.

Extend Pay_Employee.TaxCode field to 6 characters long

To accommodate the new 6-character Scottish tax codes which are prefixed with an S the Pay_Employee TaxCode has been extended to 6 characters.

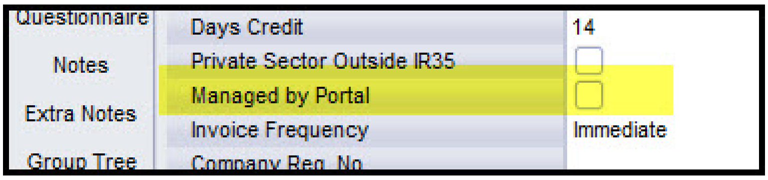


Shift fill view - button to Add Unavailability etc.

When a user is on the last page of the Fill Shifts wizard and contacts a candidate for their availability they can add their unavailability via a new button on the top right of the view.

Client field for 'IsPortal'

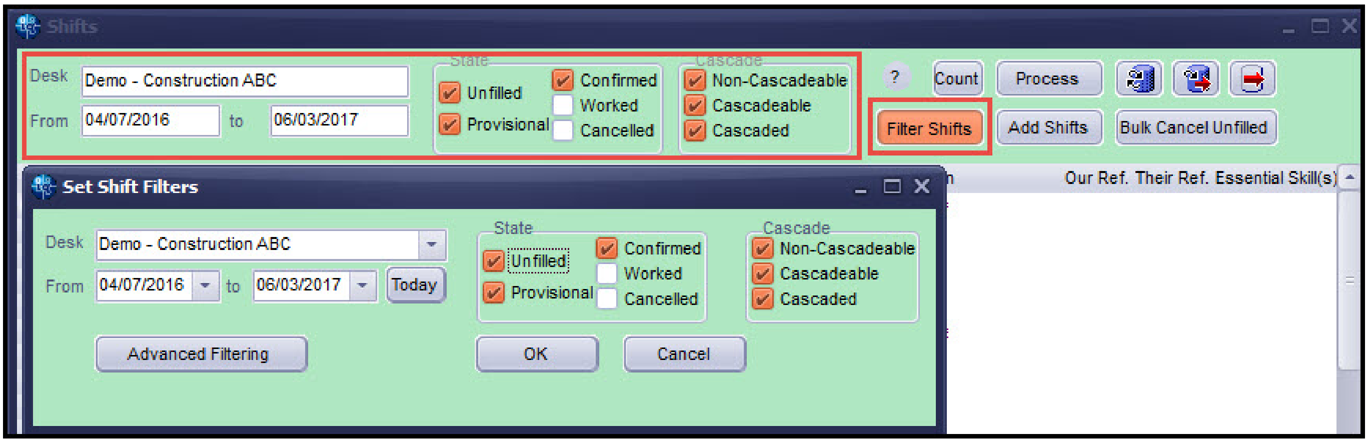
Companies can now be identified as ‘Managed by Portal' via a tick box in Company - Miscellaneous. This setting will be useful for reporting purposes.



Shift view - use dialogue to reset filters, to avoid refresh after every tweak.

Shift View Filtering has been changed to accommodate speed issues affecting large lists of shifts

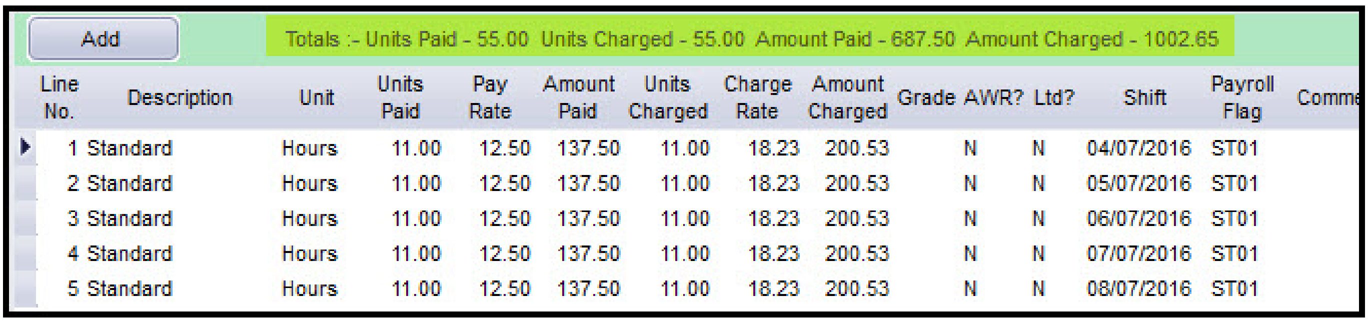
When filtering in Temp Desk Shift view large numbers of shifts can cause speed issues as each button click will cause the database to filter on each change individually. Therefore, an additional view has been added which opens when a user clicks Filter or attempts to click anywhere on the top left of the Shift view (hidden button).



The new window is a duplicate of the top part of the Shift view but allows the user to select all their filtering choices before filtering the list of shifts.

Completed Timesheet shows the sum of Units (Paid and Charged) and Amount (Paid and Charged)

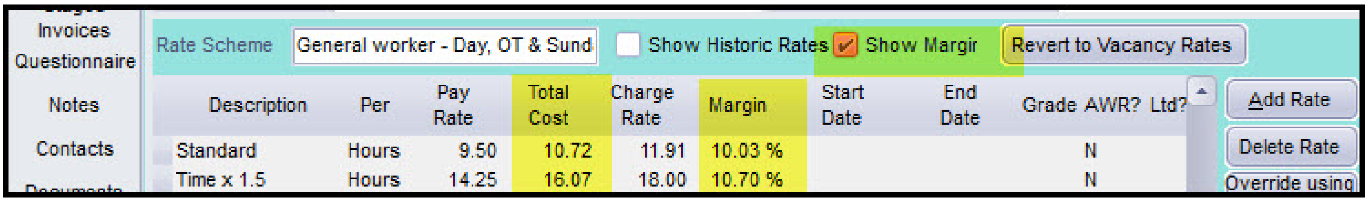
In the payband view of a provision timesheet wizard the hour totals are displayed to help when a lot of lines are displayed. This feature has been extended to completed timesheets.


Add
Totals :- Units Paid - 55.00 Units Charged - 55.00 Amount Paid - 687.50 Amount Charged - 1002.65

Line No.	Description	Unit	Units Paid	Pay Rate	Amount Paid	Units Charged	Charge Rate	Amount Charged	Grade	AWR?	Ltd?	Shift	Payroll Flag	Comme
1	Standard	Hours	11.00	12.50	137.50	11.00	18.23	200.53		N	N	04/07/2016	ST01	
2	Standard	Hours	11.00	12.50	137.50	11.00	18.23	200.53		N	N	05/07/2016	ST01	
3	Standard	Hours	11.00	12.50	137.50	11.00	18.23	200.53		N	N	06/07/2016	ST01	
4	Standard	Hours	11.00	12.50	137.50	11.00	18.23	200.53		N	N	07/07/2016	ST01	
5	Standard	Hours	11.00	12.50	137.50	11.00	18.23	200.53		N	N	08/07/2016	ST01	

Placements - to show Margin calculations in Rates as in Vacancy

Margin calculations in rates have been extended to placement rates. The Margin is displayed by clicking the ‘Show Margin’ tick box.



The Margin calculation works in the same way as the Vacancy rate margin calculation.

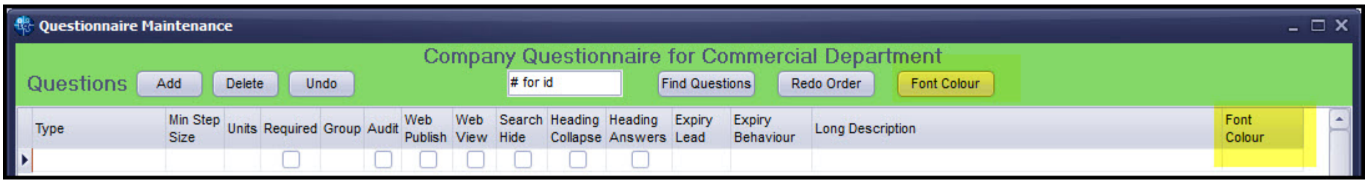
Requires System Administrator setup.

System Administrator

Questionnaire Additions

Questions, Choices and Sub-choices in Questionnaires (General and Departmental) have been extended to 60 characters allowing more flexibility when adding questions.

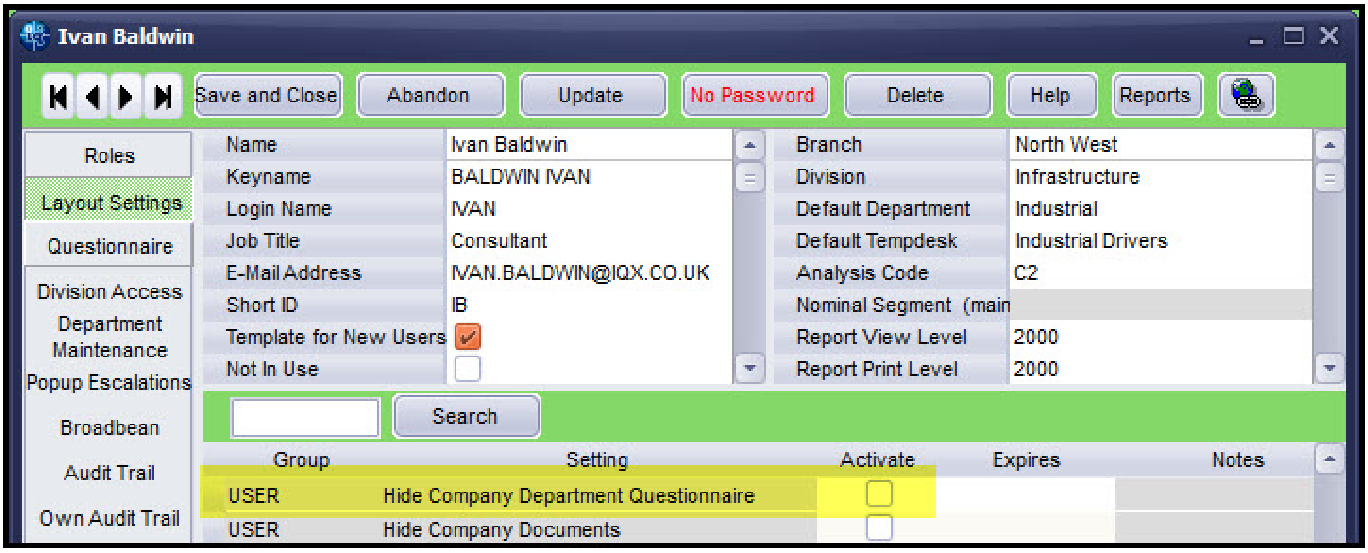
The display of questionnaire questions can be customised by setting different font colours. Use the font colour button to set colours in the far right hand column.



Departmental Questionnaire for Companies

Departmental questionnaires have been added for Companies. The location and functionality of the questionnaires is the same as other departmental questionnaires. (Agency Setup - Departments). The Company departmental questions are displayed in Company - Questionnaire above the General questions and in the top left view. Users see only the Questions for their own Department.

In Maintenance - User the visibility of Company departmental questions can be switched on or off for each user.

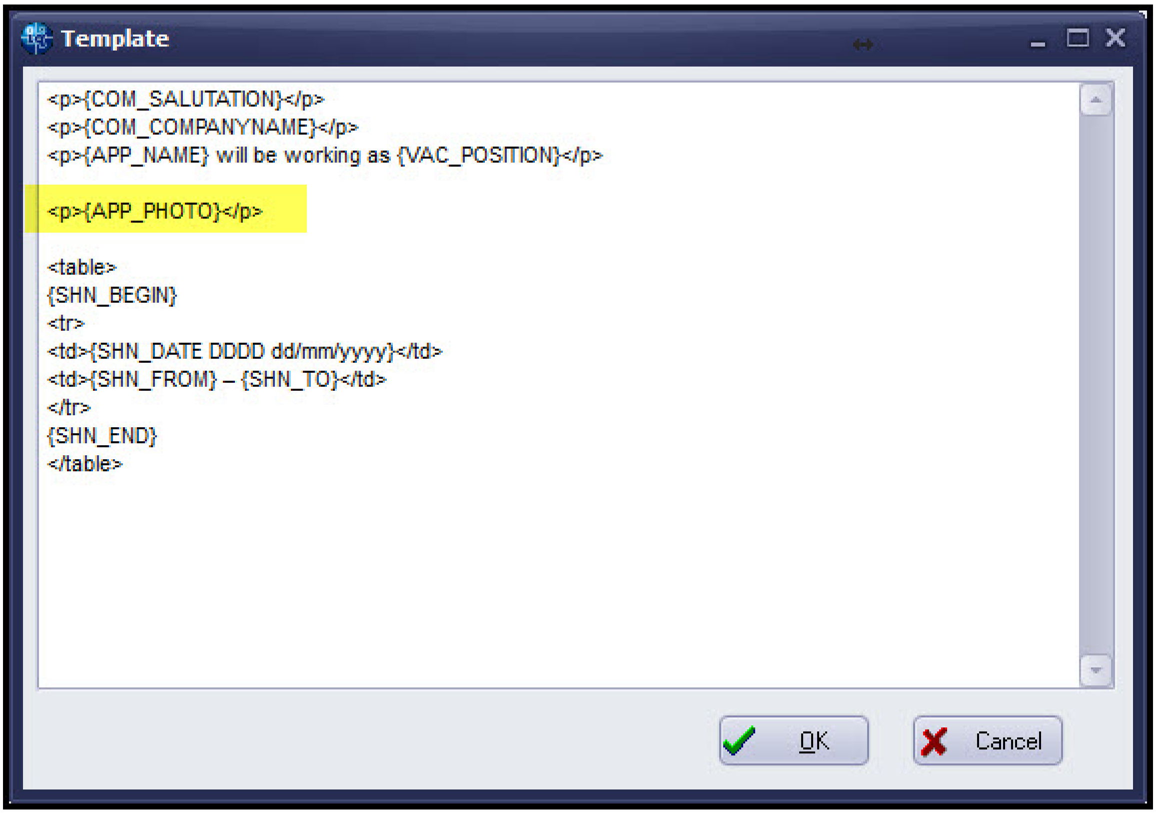


Departmentalised questions can now be searched using Company Selector - Search criteria.

Embedding Images in Notifications

Images can be embedded in notification in two ways

Adding {APP_PHOTO} to the relevant Notification template will pull through the candidate image stored in Person - Photo.

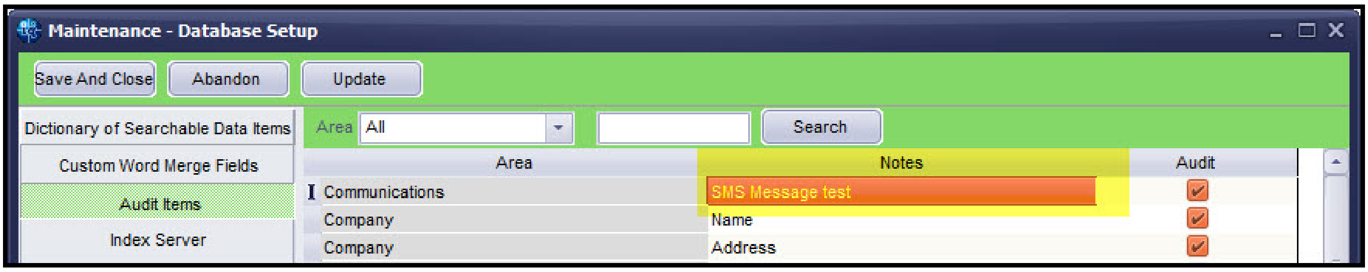


Adding <IMG SRC="file location/name "/> to the relevant Notification template will pull through an image from a folder.

Note Person - Photo will only store jpg images. However, adding a file from a folder location will allow other image formats to be used.

Clarify Audit Terminology

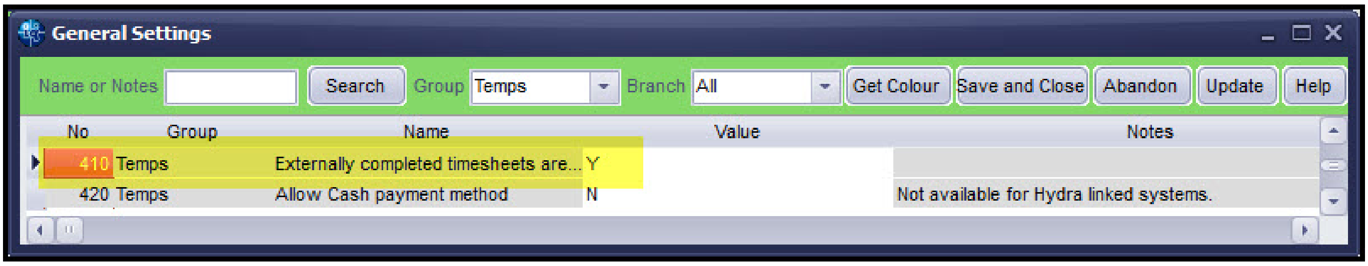
In Database Setup - Audit Items, it is now possible to edit the Notes field to allow clarification of audit terminology.



Protect Timesheet Images before PDF process

A new feature which allows agencies to store images, created by the standard image linker, on the blobstore has been provided. This can protect linked images from unauthorised renaming or removal avoiding problems when creating invoice pdfs due to incorrectly named or missing timesheet images.

Switch Temps 1080 activates storing the linked images on the blobstore. Previously linked images will not be stored in the blobstore but will still be accessible in in existing folders.



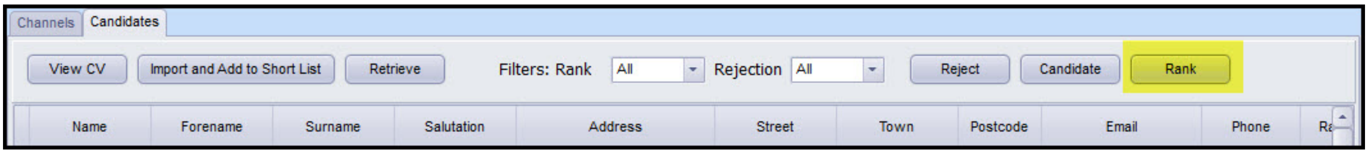
Extra images activated by General Settings - Accounts 410 will still be stored in folders and not in the blobstore.

Person Based image linked images will still be stored in external folders and not on the blobstore.

Direct Link from IQX to Broadbean

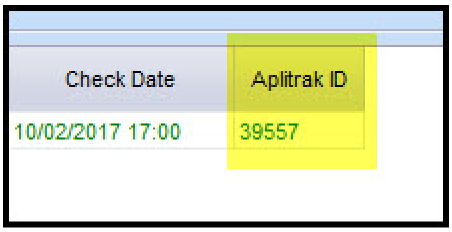
A new way of accessing Broadbean directly from within the IQX Broadbean view has been added.

A new Rank button has been added in the Broadbean IQX view and is activated by inserting a Broadbean Token Key in Maintenance - User - Broadbean. This key is obtained directly from Broadbean.

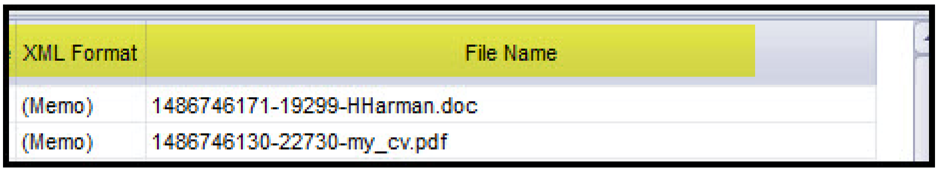


Once a vacancy has been posted to Broadbean and candidates have applied for a position Users have passwordless access the vacancy in Broadbean via the Rank button. Then users can pull through candidates into the Broadbean IQX view.

The Broadbean ID (Applitrak ID) for each vacancy is visible at the far right of the IQX Broadbean Advert tab.



If a User has Maintenance rights they will also be able to see the xmlformat (of CV) and filename.

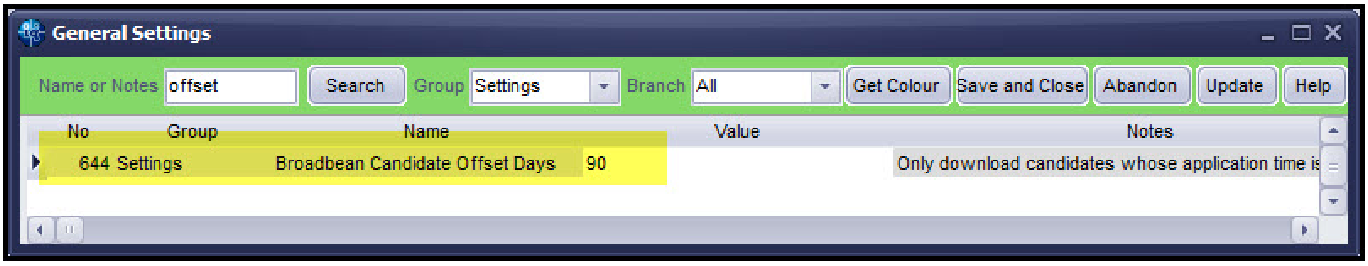


Broadbean - Auto retrieval of all applications

A new General Setting has been added to exploit the ability to download Broadbean applications to the Broadbean view, in the past x days. This is not to import or shortlist the candidates, just retrieve their application into the Broadbean IQX form.

An xml job will import current candidate applications from Broadbean into the IQX Broadbean view based on the number of days offset from the current date.

Settings - 644 allows the limiting of number of offset days the xml job will search (default 90 days).



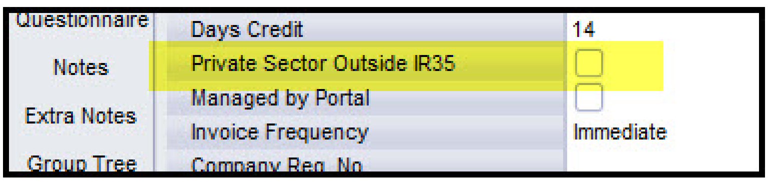
The job will populate the relevant Broadbean vacancy/candidate view (pulling down the CV, email body and xml format), for review by the User.

This job does not automatically import applicants into person records.

Contact IQX for the Import xml.

Method of identifying Private Sector Companies re IR35

A new tick box had been added to both versions of Company - Miscellaneous 'Private Sector outside IR35' to enable agencies to identify which companies are Exempt from the Public Company IR35 regulations.

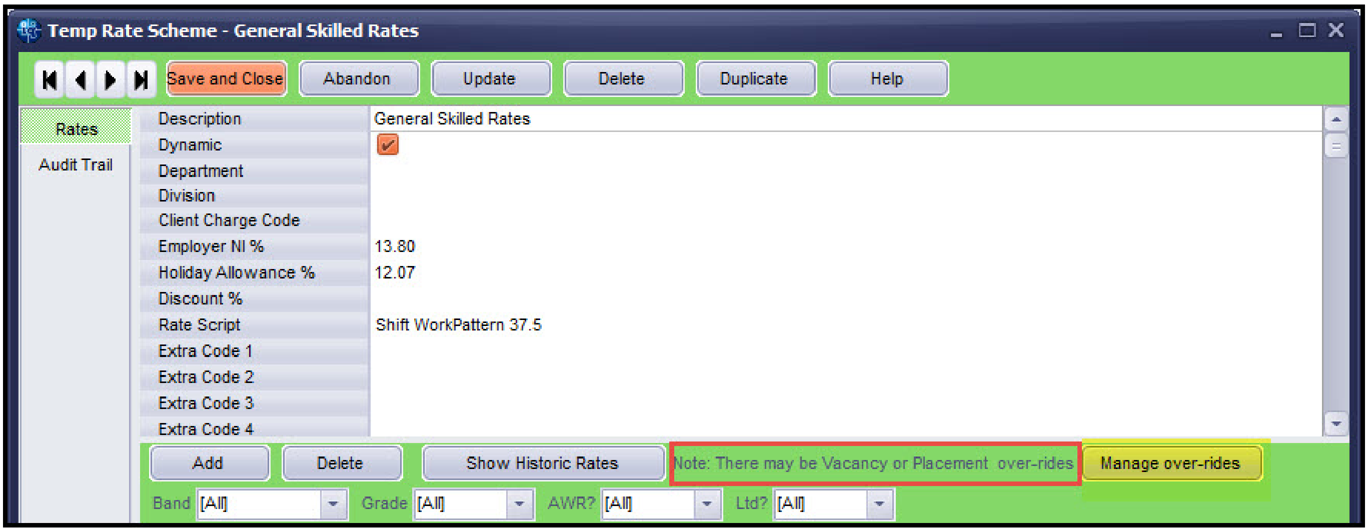


Also, a User role has been added Can override Public Sector client. This enables a user to edit 'Override IR35 Public Sector' tick boxes in Placement - top right window and Vacancy - Misc. Payroll transfer will need to be amended to use these settings according to the end payroll requirement.

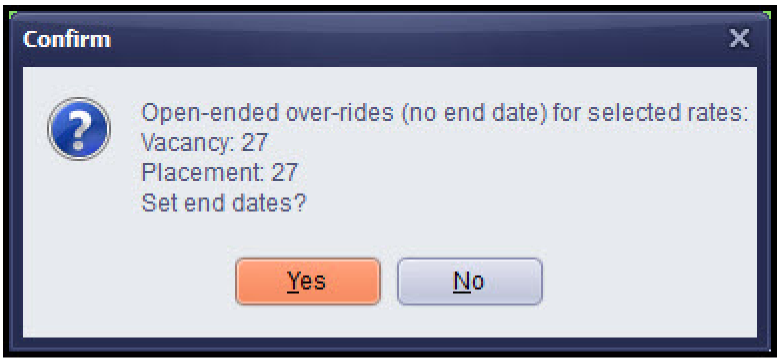
Dynamic Schemes - apply dates to overrides

Extra functionality has been added to Rate Scheme maintenance form to allow Users to do controlled updates of over-rides, on demand.

In Maintenance - Temps Setup - Rate Schemes - Rate Scheme there is a static warning message 'There may be Vacancy and Placement over-rides' serving as a warning to Users that if rate start and end dates are changed it will impact on over-rides.



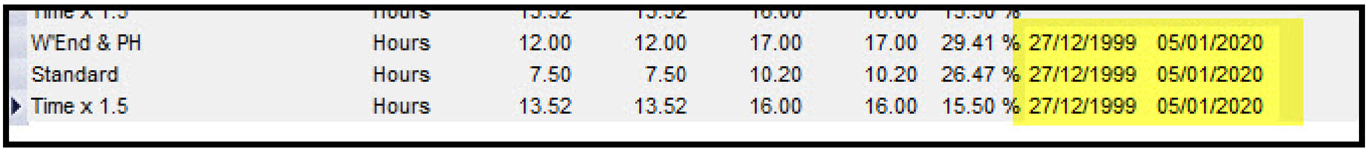
There is a button which will search for open-ended (no end date) over-ride rates in both placements and vacancies relating to the currently selected rates in the scheme (using the filter combos) and report the numbers.



If there are any open ended over-ride rates an end date can be added to them.

Enforce 'end of week' rate dates in Rate Schemes

Rate Scheme start and end dates are not used in timesheet calculation by the day but by the week the day falls in. Therefore, days set in the Start/End date columns for each rate will default to the beginning or end of the week the date entered falls in, depending on which rate scheme start or end column is used.

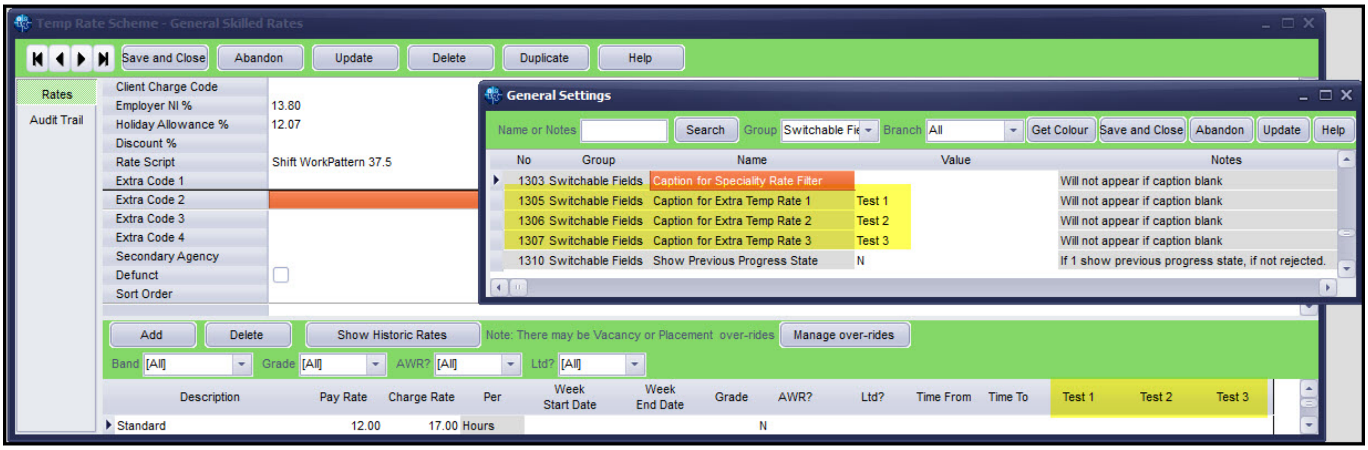


This change affects Maintenance - Temps Setup Rate Scheme (expand) and Vacancy/Placement - Rates

Extra columns to Rate Schemes

Three additional columns can now be added to rate schemes (not for invoice processing) to allow agencies to record additional information as required by their clients.

The three extra columns can be added ExtraRate 1, 2 and 3 with soft headers for Terminology.



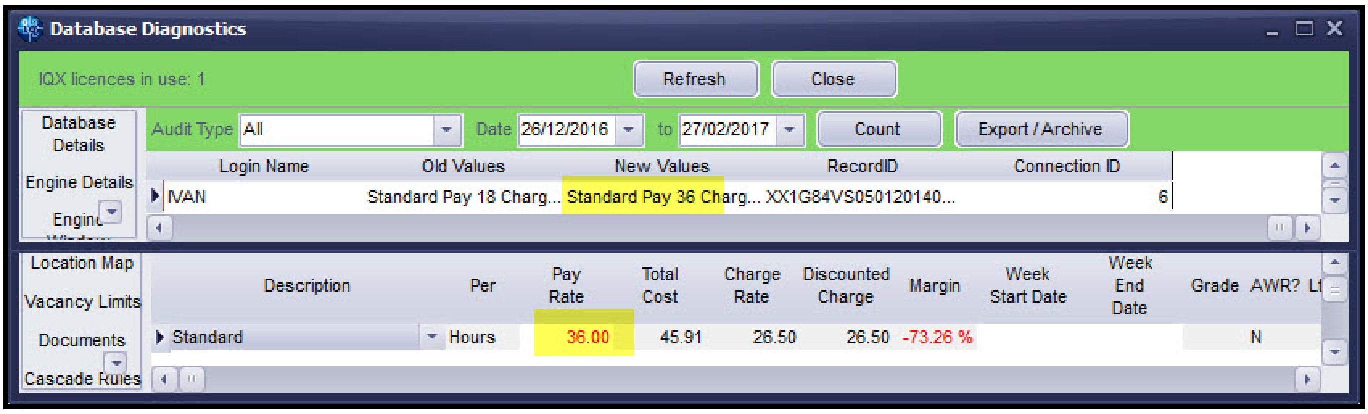
The extra columns are only added via adding captions into Switchable Fields 1305-7. They are visible in Vacancy, Placement and Temp Setup - Rate Schemes.

A db function will be required to deliver the relevant rates for reporting, respecting date ranges and over-rides.

Please contact IQX for support with using ExtraRate information in reports.

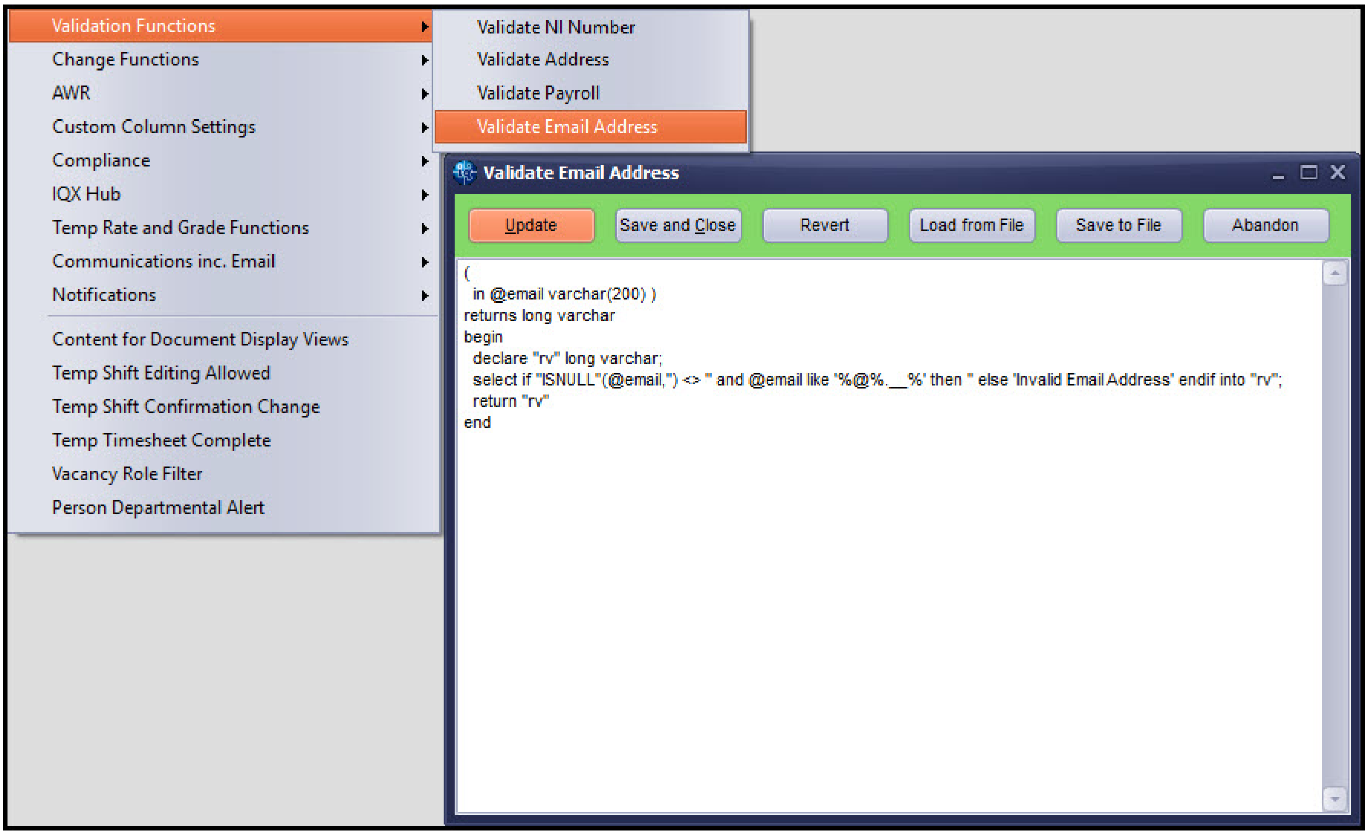
Auditing of individual rates on Vacancy and Placement

Changes to rates in Vacancies and Placements are now audited with a list of all the previous and changed rates.



New Validation script for email addresses

A new validation script has been added to Maintenance - Database Functions - Validation Functions - Validate Email Addresses.



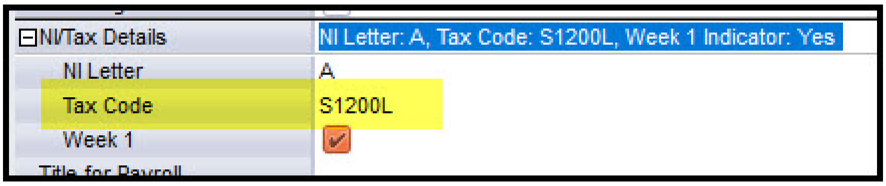
This function allows agencies to create validation scripts to avoid illegal characters being saved into IQX

For example, a script could be used to avoid mistakes where @ are missed out of emails.

The script validates emails in: Person - Get in Touch, Person - Details, IQXWeb - email address, Company contact - email and Company Contact - Email.

Extend Pay_Employee.TaxCode field to 6 characters long

To accommodate the new 6-character Scottish tax codes which are prefixed with an S the Pay_Employee TaxCode has been extended to 6 characters.



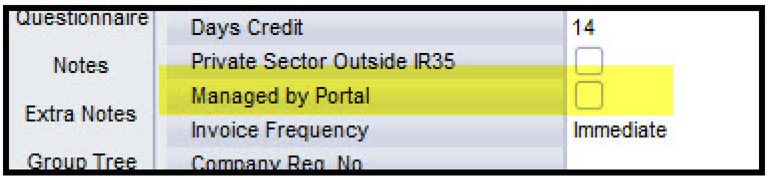
Contact IQX for SQL to update , in advance, older versions of IQX with this change.

Shift fill view - button to Add Unavailability etc

When a user is on the last page of the Fill Shifts wizard and contacts a candidate for their availability they can add their unavailability via a new button on the top right of the view.

Client field for 'IsPortal’

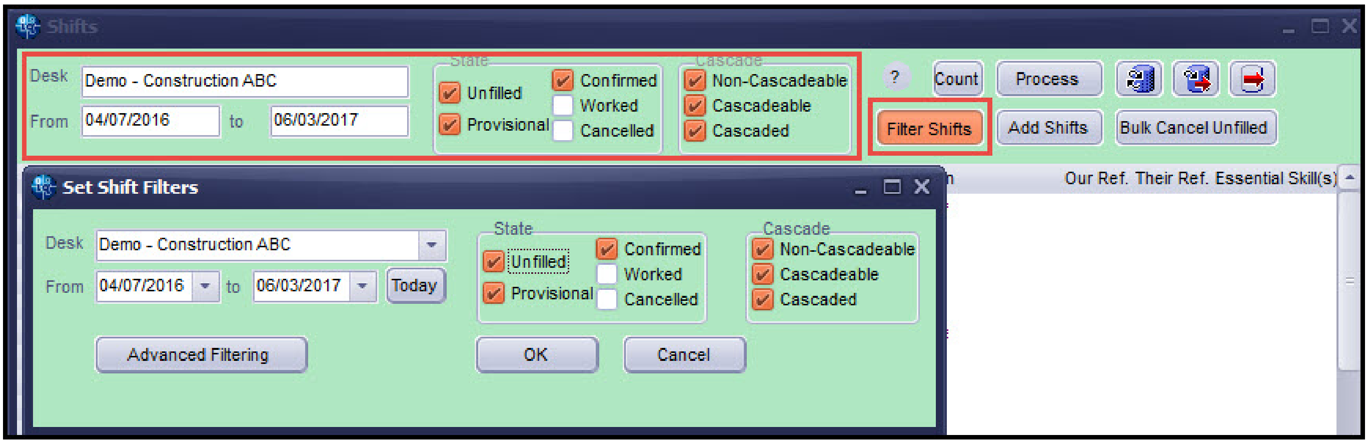
Companies can now be identified as ‘Managed by Portal' via a tick box in Company - Miscellaneous. This setting will be useful for reporting purposes.



Shift view - use dialogue to reset filters, to avoid refresh after every tweak

Shift View Filtering has been changed to accommodate speed issues affecting large lists of shifts

When filtering in Temp Desk Shift view large numbers of shifts can cause speed issues as each button click will cause the database to filter on each change individually. Therefore, an additional view has been added which opens when a user clicks Filter or attempts to click anywhere on the top left of the Shift view (hidden button).



The new window is a duplicate of the top part of the Shift view but allows the user to select all their filtering choices before filtering the list of shifts.

Completed Timesheet shows the sum of Units (Paid and Charged) and Amount (Paid and Charged)

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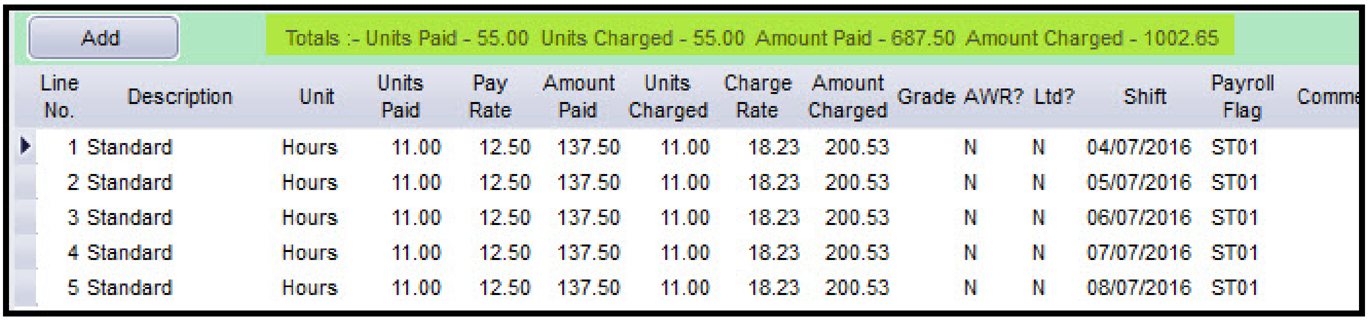
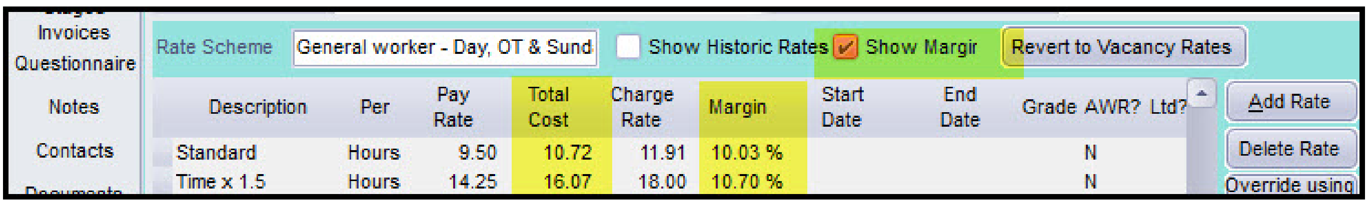
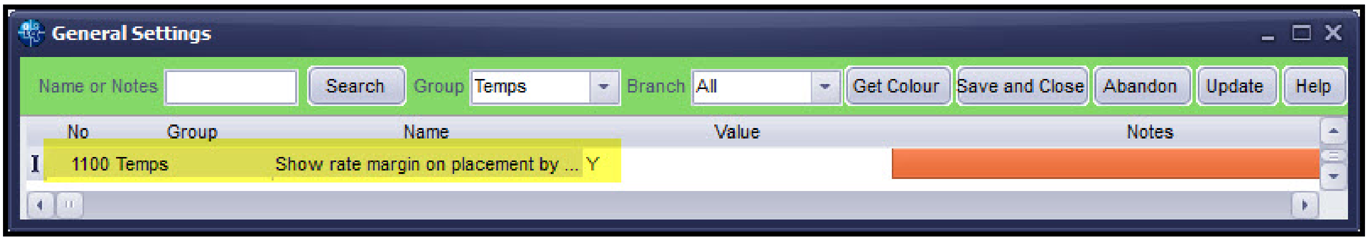


Placements - to show Margin calculations in Rates as in Vacancy

Margin calculations in rates have been extended to placement rates. The Margin is displayed by clicking the ‘Show Margin’ tick box.



This box defaults to unticked unless General Settings – Temps 1100 'Show rate margin on placement by default' is set to Y.



The Margin calculation works in the same way as the vacancy rate margin calculation.

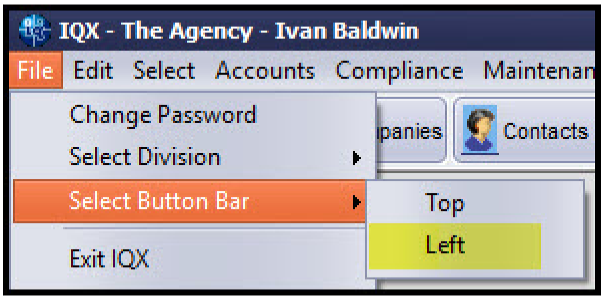
E-tips - creating shifts from emails

Shifts can be added to a vacancy from emails via the new Etips system.

Contact IQX for further information.

Alternative IQX button bar - left position and new icons

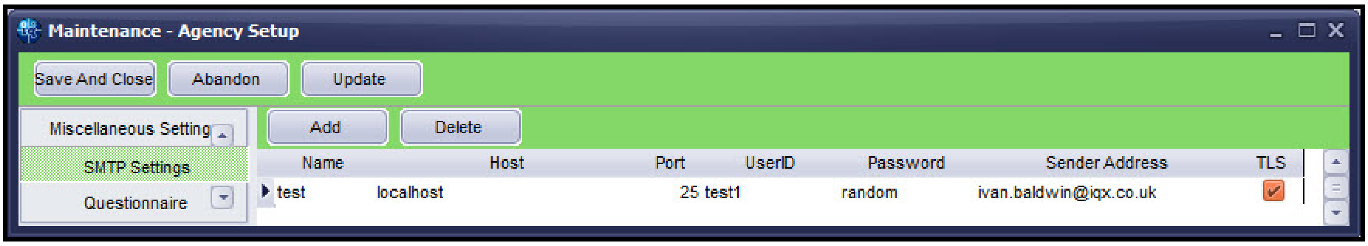
An alternative IQX button view has been set up in IQX to give the User more flexibility arranging their view of IQX. A User will be able to switch the button bar between the existing horizontal top view and the new vertical left view, according to personal preference.



The button images need to be imported. Contact IQX support for instructions on setting up this feature.

Facility to edit additional SMTP profiles in IQX

Additional SMTP profiles can be stored in IQX allowing for the use of Jobs and other Hub activities that differ from the single DEFAULT profile currently maintained in Maintenance - IQXNet Setup.



The SMTP profiles can be added, edited and deleted.

The DEFAULT profile is still available in Maintenance - IQXNet Setup.

Add a programmable button to placement

A programmable button can be added to the Placement view. This button can be used to run a script or a job, or open a form or a web page.

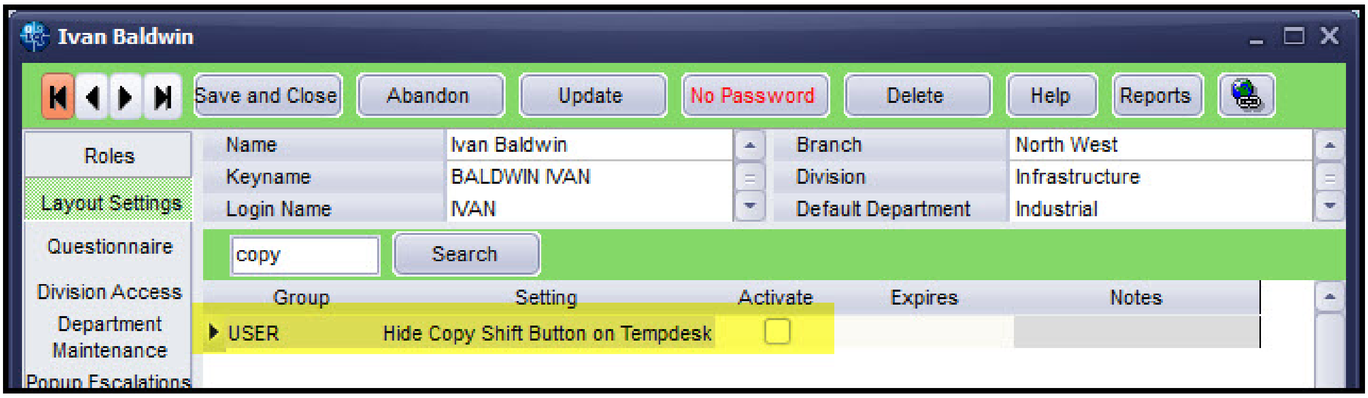
The button caption and associated script can be added in Maintenance General Settings - Programmable Buttons (10 and 11) - Placement Caption and Placement Script.

When a caption and script is entered, a button will appear on the top right of the Placement record.

Limit the ability to Copy shifts to a User Role

The visibility of the Copy Shifts button in Temp Desk - Vacancy and Temp Desk - Vacancy Shifts can be controlled with a User setting.

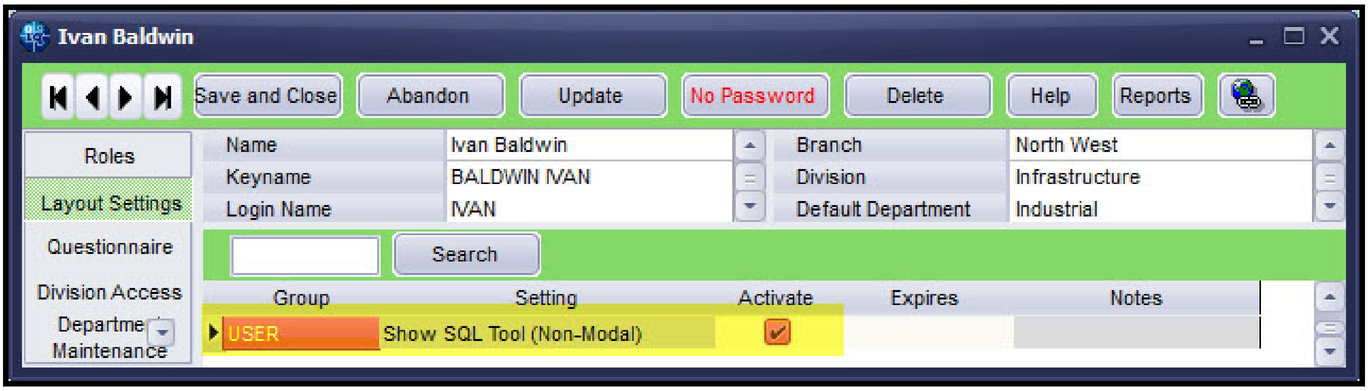
The Copy Shift button is hidden by clicking the 'Hide Copy Shift Button on Tempdesk' tick box in Maintenance - Users - Layout Settings.



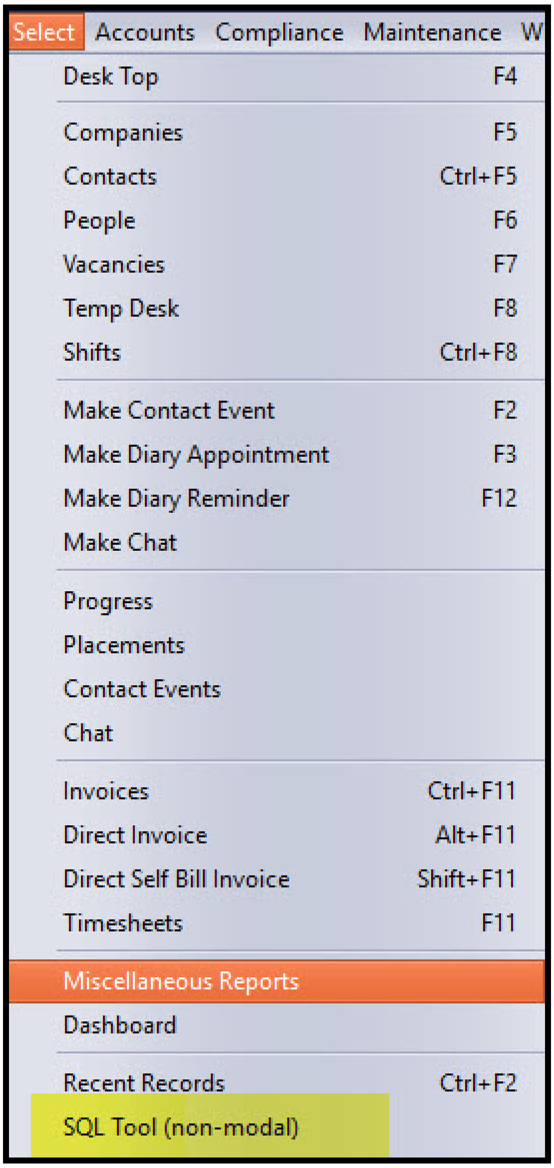
Clicking of the 'Copy Shifts' button is automatically audited and visible in Maintenance - Database Diagnostics - Audit Trail.

Custom User role for SQL non-modal only

A new user role setting has been added which allows access to the Non-Modal SQL Tool for users without Technical access.



With the User role ‘Tech Support’ unticked and User Layout setting ‘Show SQL Tool non-Modal – ticked Users can select SQL Tool (Non-Modal) in the Maintenance and Select drop down menus.



Payroll Transfers - visibility linked to Accounts role instead of Technical

Support

The means of controlling the Payroll Transfers view, has been switched from Technical Support to Accounts. This change more accurately reflects the role with a greater involvement in financial matters.

With Accounts rights on and Switchable Views 540, (or Accord linked), on users can see the Payroll Transfers sidebar menu item in Person records. This information is view only.