Release 2.18.4

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

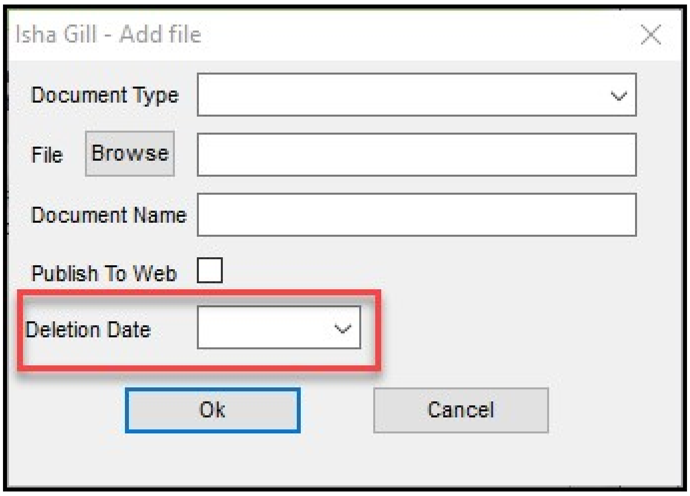
The following new features require System Administrator Setup in order for them to work:

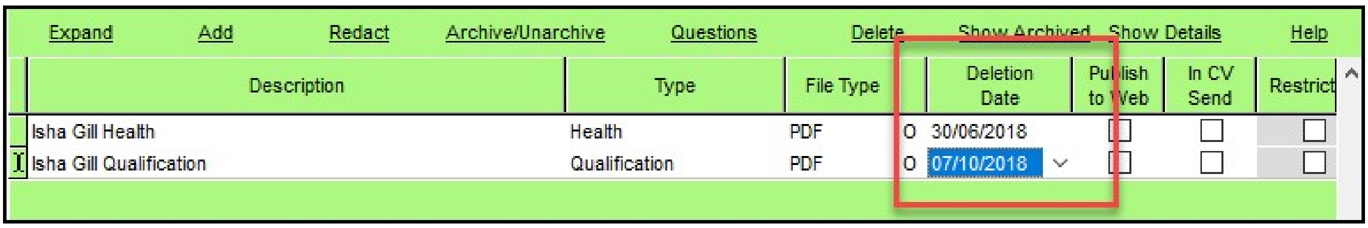
- Headline available on Contact Events
- Auto-matching Candidates to Vacancies
- Secure service for sending out Data Access Requests (and other files)
- Programmable button can be added to completed timesheets

Adding deletion dates to individual documents

A new field is available when adding documents which allows the setting of a deletion date for that document. For example when a certification has expired.

Running the PurgeDocuments.xml from your XML folder will delete documents with a deletion date prior to the current date.

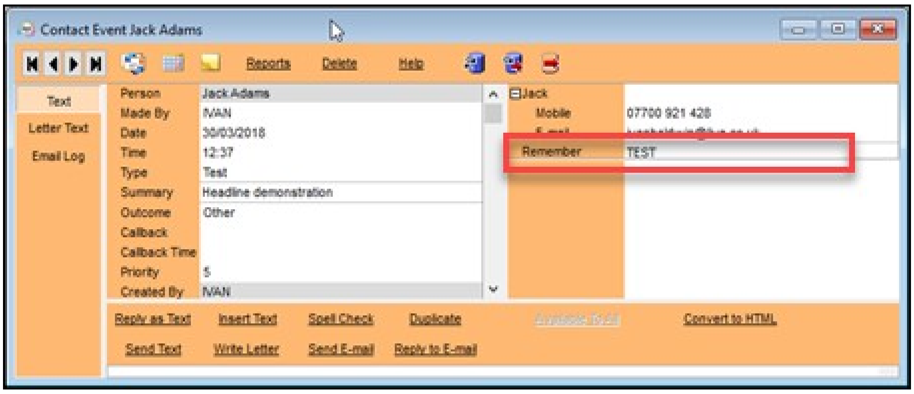




Deletion dates can be specified for documents already added to the database as well as new documents.

Headline available on Contact Events

A headline can now be added to Contact events. The Headline will appear in the top right window of the contact event.

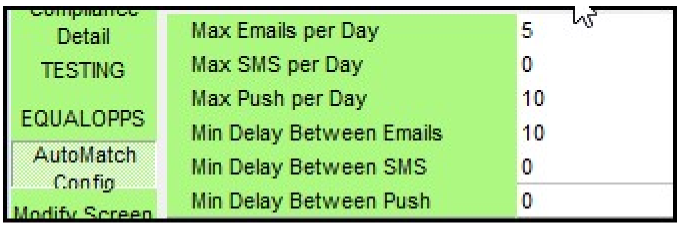


This feature requires System Administrator setup.

Auto-matching Candidates to Vacancies

Auto-matching can be used to automate the matching of candidates to vacancies and informing them of opportunities.

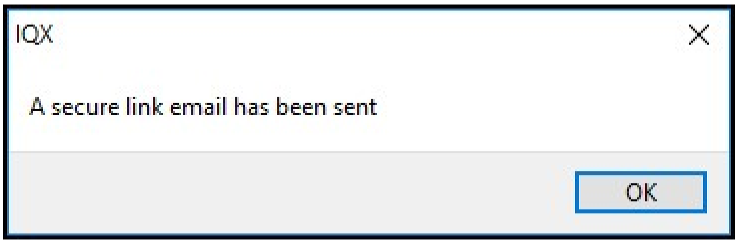
The number and frequency of these communications can be controlled to maximise the benefit of this feature and allow candidates to specify acceptable settings.



This feature requires System Administrator setup.

Secure service for sending out Data Access Requests (and other files) - Based on IQXHub

This feature arose from a need to improve the security of GDPR Access Report emailing. However, it can be used for the secure dispatch of any files from IQX.
Using the GDPR Data Access Report as an example clicking email will cause a confirmation message to appear.



The candidate will receive an email with a link to the document download page. On clicking this the following will appear in their Browser.

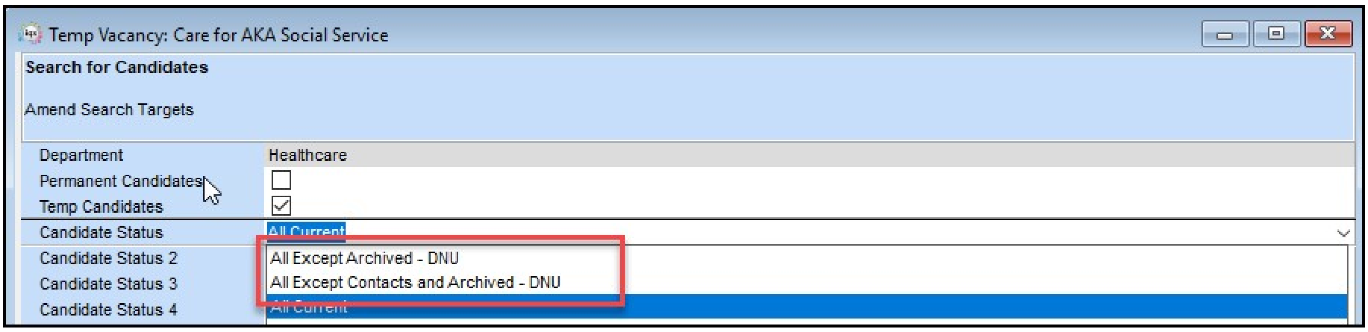
In addition, it will then generate a new email containing the password. This password will both download the zip file and allow the candidate to open the password protected file.

This feature requires System Administrator setup.

For more information on this feature please contact IQX.

Amend the Vac Search initial states criteria so that ALL is ALL except Archived

In Vacancy Search Archived and Do Not Use Candidate statuses can now be excluded for the search criteria.



Programmable button can be added to completed timesheets

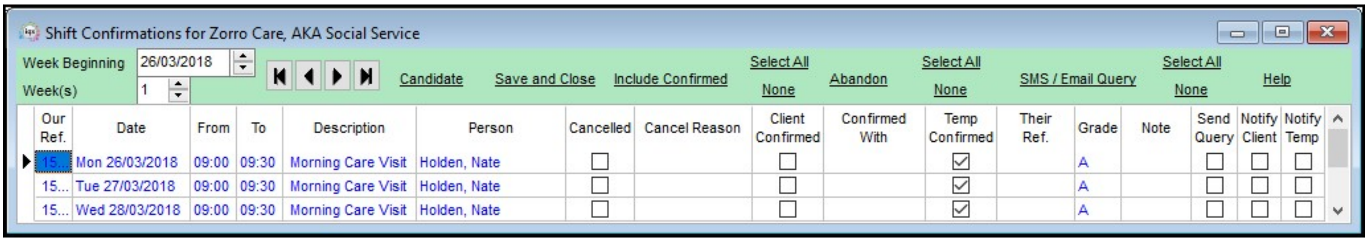
It is now possible to add two programmable buttons to Completed timesheets.

This feature requires System Administrator setup.

Cancel confirmation notifications from different locations

To streamline the shift confirmation process, shift confirmations from Temp Desk – Shifts and Person – Diary will now open the Shift Confirmation Screen to provide the ability to send Shift Notifications out.

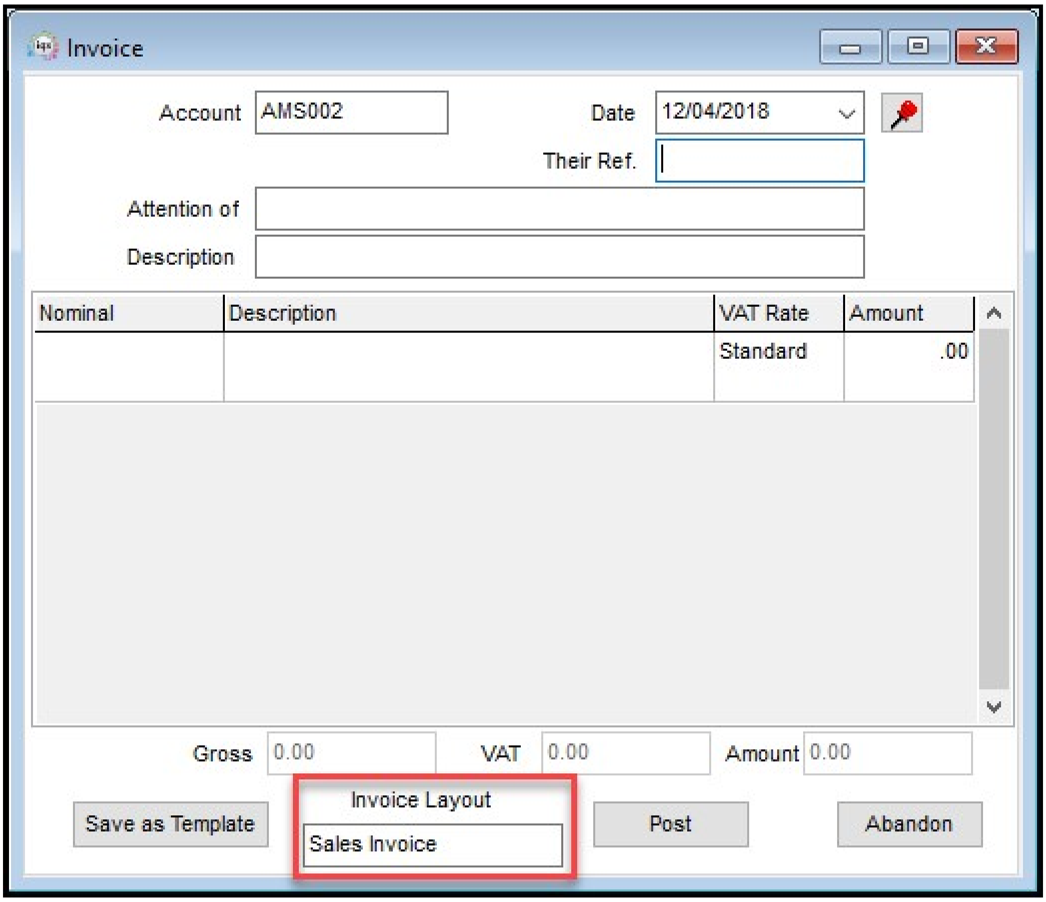
Cancelling a shift in these locations also links to the Shift Confirmations view.



Adhoc invoice form show template used

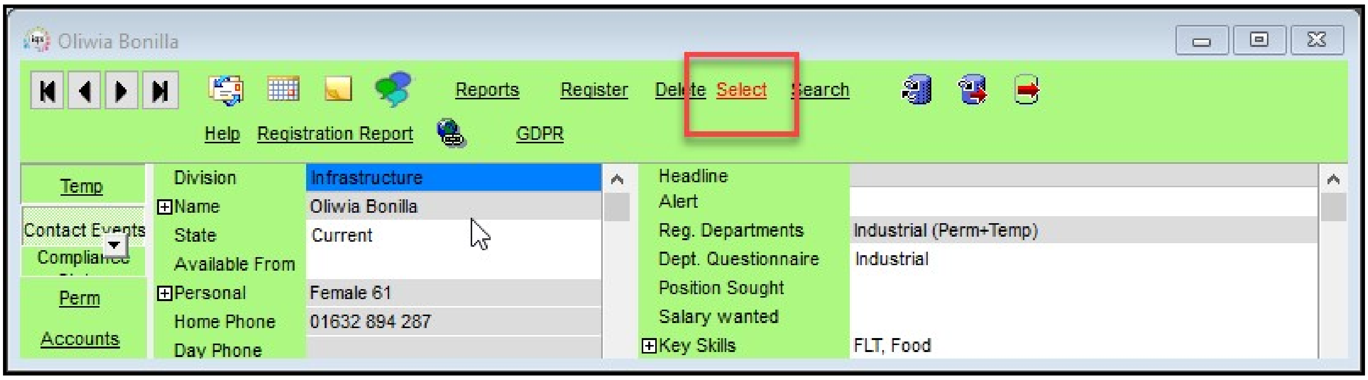
When adding an adhoc invoice the invoice layout template being used is now displayed at the bottom of the view. This display recognises overrides detailed in Agency Setup - Divisions and in Company - Accounts - Accounts.

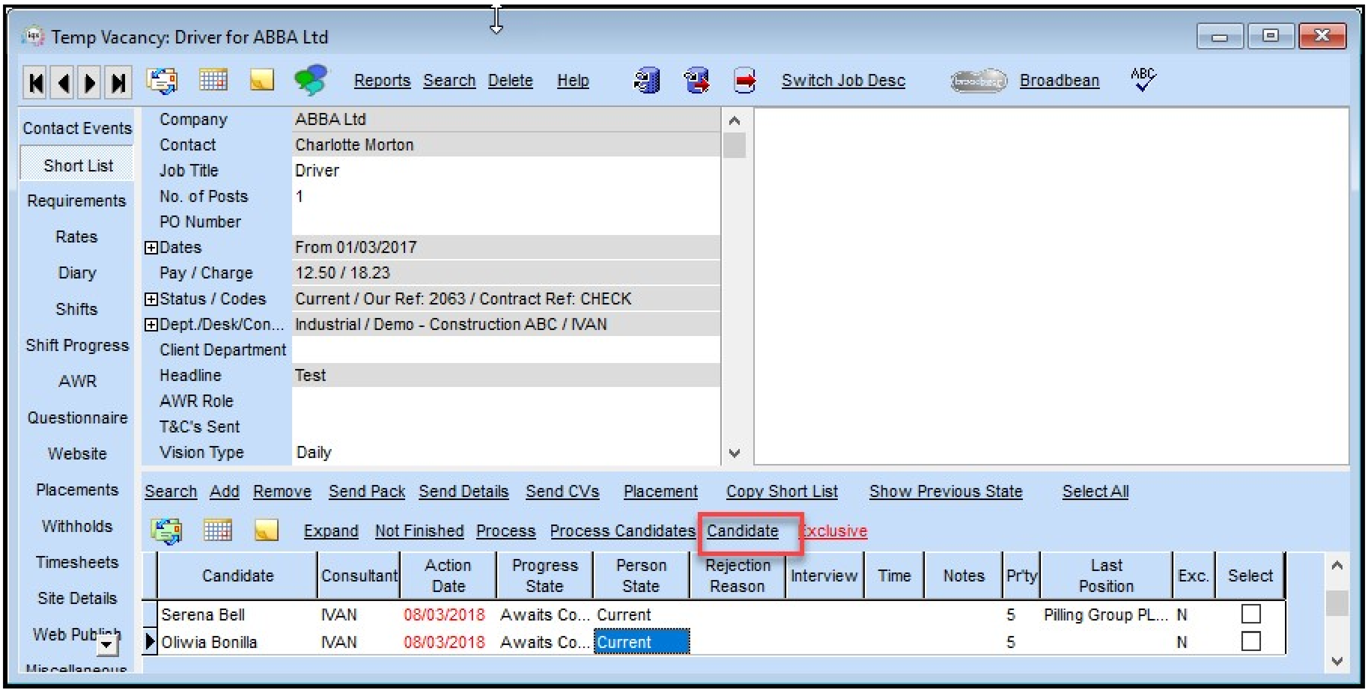
The default invoice template is Sales Invoice.



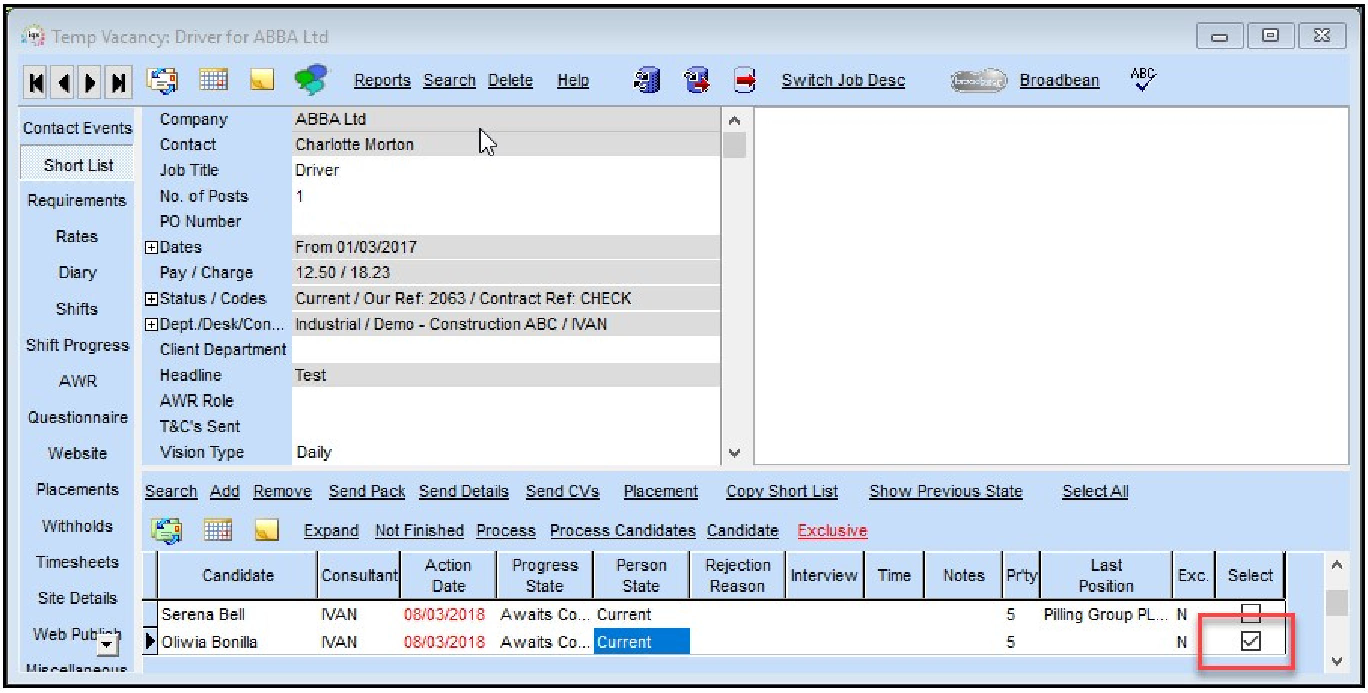
Enable Select button on Person when videoing from Vacancy - Shortlist

When reviewing shortlisted candidates in Vacancy - Shortlist it is possible to select a suitable candidate by clicking on Select in the candidate record.
The candidate will be selected in Vacancy – Shortlist.





When in Vacancy - Shortlist - select a shortlisted candidate and click on candidate button to expand the record - Click through the list using the radio
buttons - Click Select and the candidate will be selected on the shortlist.



Review P45 process - add remove bank details (GDPR)

As part of the GDPR tools provided by IQX a candidate's bank details can be removed from Person – Payroll when P45/Leave is clicked. Selecting 'Clear Banks Details' will remove a candidate's bank details.

Warning: Only clear the bank details once the last timesheet has been completed and transferred to Payroll.

System Administrator

Gender Pay Gap Reporting

From April 2017,companies with more than 250 staff are legally required to calculate and publish on their website information related to gender pay gaps.
In particular the following:

- Mean and median gender pay gap for basic and bonus pay
- Proportion of male and females receiving a bonus payment
- Proportion of male and females in quartile pay bands

IQX have produced reports which, once customised, can be used to enable agencies to calculate this information from their IQX database. The configuration will need to take account of issues such as legal entities, person states and paybands.

The development of these reports to suit your Agency's circumstances will be chargeable.

Further advice on gender pay gap is available at:

https://www.gov.uk/guidance/gender-pay-gap-reporting-data-you-must-gather
https://www.gov.uk/guidance/gender-pay-gap-reporting-make-your-calculations
http://www.equalpayportal.co.uk/gender-pay-gap-reporting/
http://www.legislation.gov.uk/ukdsi/2017/9780111152010
https://www.rec.uk.com/news-and-policy/corporate-blog/gender-pay-reporting-what-recruiters-need-to-know
http://www.cbi.org.uk/cbi-prod/assets/File/pdf/gender-pay-webinar-22-feb.pdf

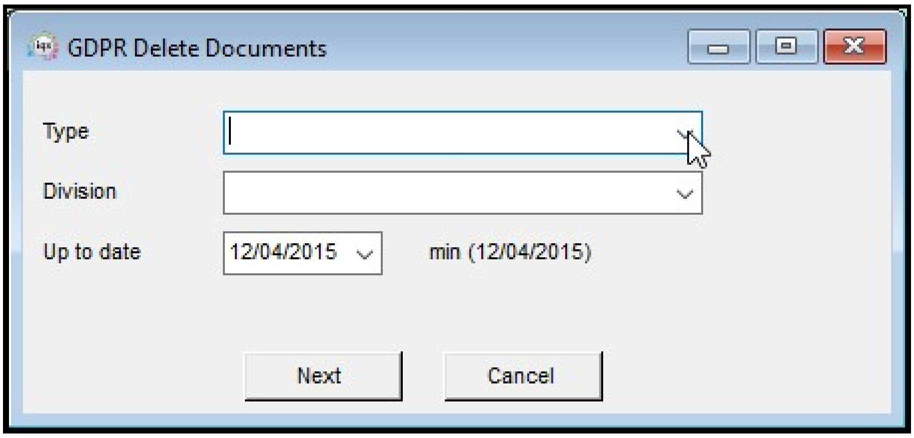
GDPR - Job to delete historic documents in bulk

A new job is available to allow agencies to delete old documents which were created or edited before a certain date or have reached a deletion date.

This job is included in the additional document zip file included when upgrading.

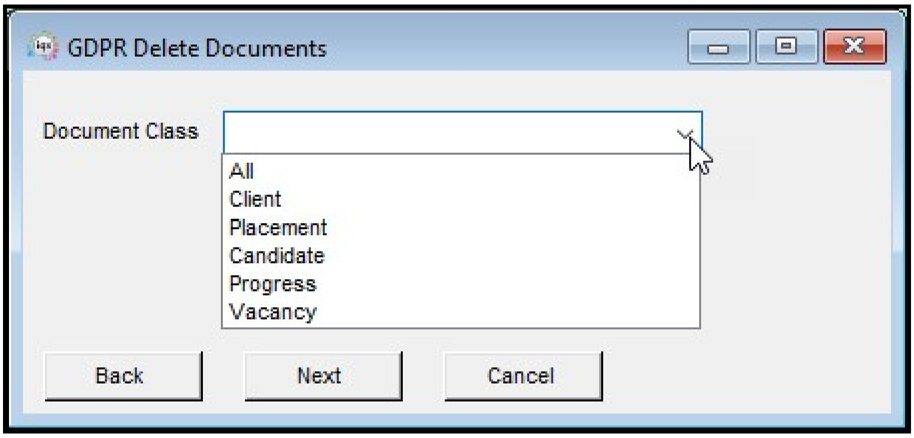
Bulk Deletion of Documents

In Maintenance – Run a Job run the PurgeDocuments.xml from your XML folder. Documents:

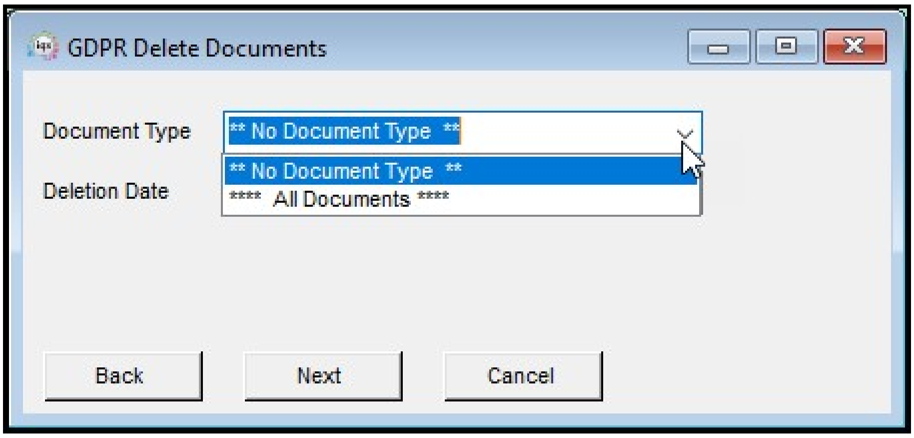


Select the document type (CVs, Contact Event letters and Documents) from the drop down and if applicable select the Division.

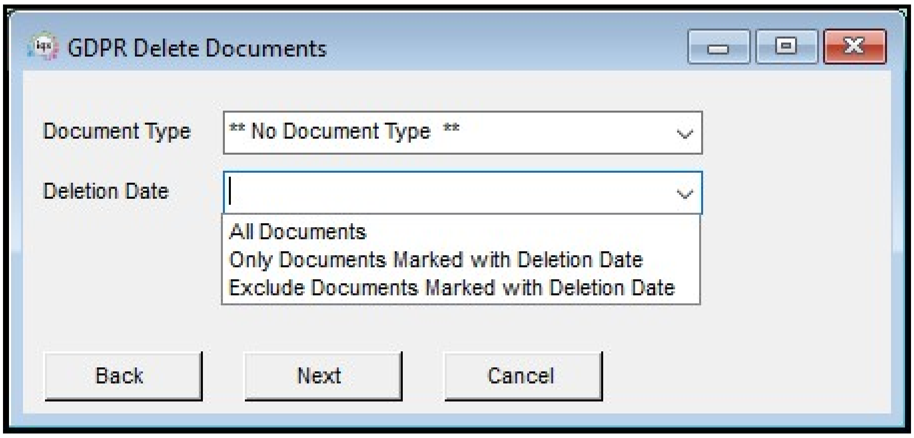
The deletion date has been set to a minimum of three years prior to the current date to protect recent documents.



If you are deleting documents this can be selected by class.



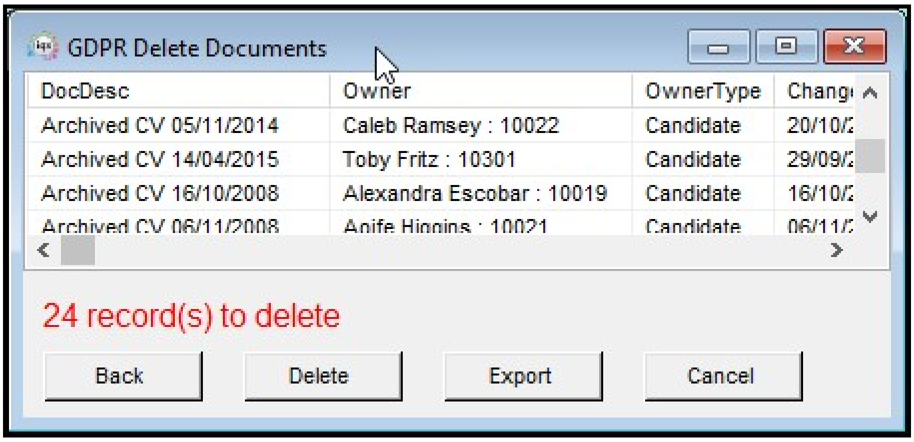
The next screen asks you to select the document type and the deletion date. If you select **No Document Type** this will remove documents that have been added without a document type being selected.



Users are offered the option to delete all Documents, those with a deletion date or exclude those with deletion dates

CVs: When deleting CVs a stored selection can be used to refine CV deletions.

On the next screen you will be asked to choose whether you want to keep the CV text.



A summary of the documents for deletion is displayed for review. Export will allow a list of the documents deleted to be stored as a csv file.

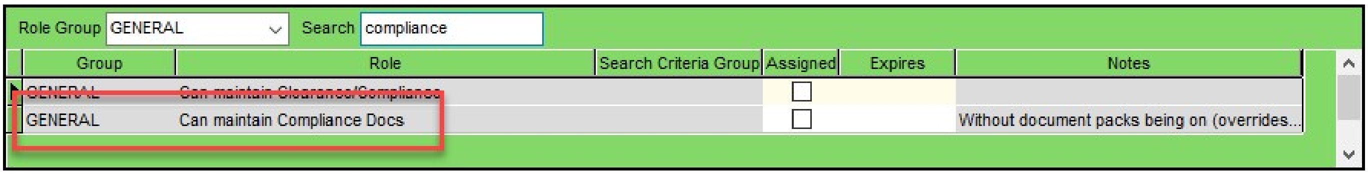
Note: Restricted documents will not be deleted and all deletions will be audited.

New ‘Can Maintain Compliance Docs’ User Role

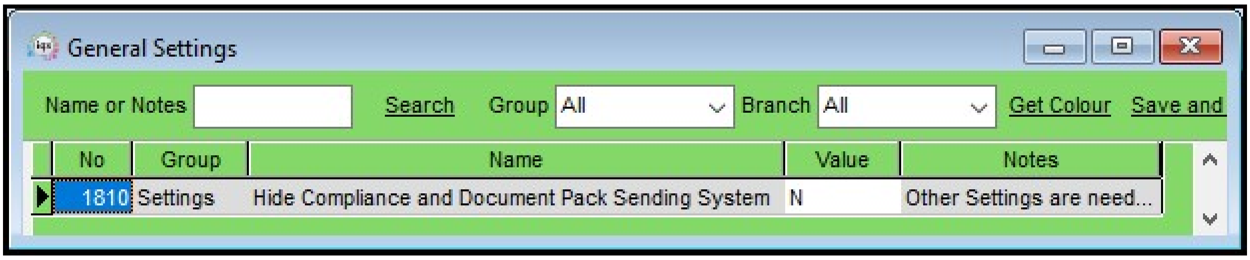
Where an agency does not have a dedicated Compliance Team a new role ‘Can maintain Compliance Docs’ has been created which allows compliance
documents to be used by users who do not have the full ‘Can Maintain Clearance/Compliance’ Role.

The aim of the new role is to enable agencies to create a structure around their compliance process as it allows questions to be linked to
document types to help guide users through the compliance process as well as the ability to:

- Use the button on the Document View to 'Copy to Compliance Documents',
- Drag a file from an email or folder to Compliance Documents,
- Make use of the redaction tools.



Note: This role is for agencies who have no user with ’Can maintain Clearance/Compliance’ switched on and General Settings – Settings 1810 is set to N.

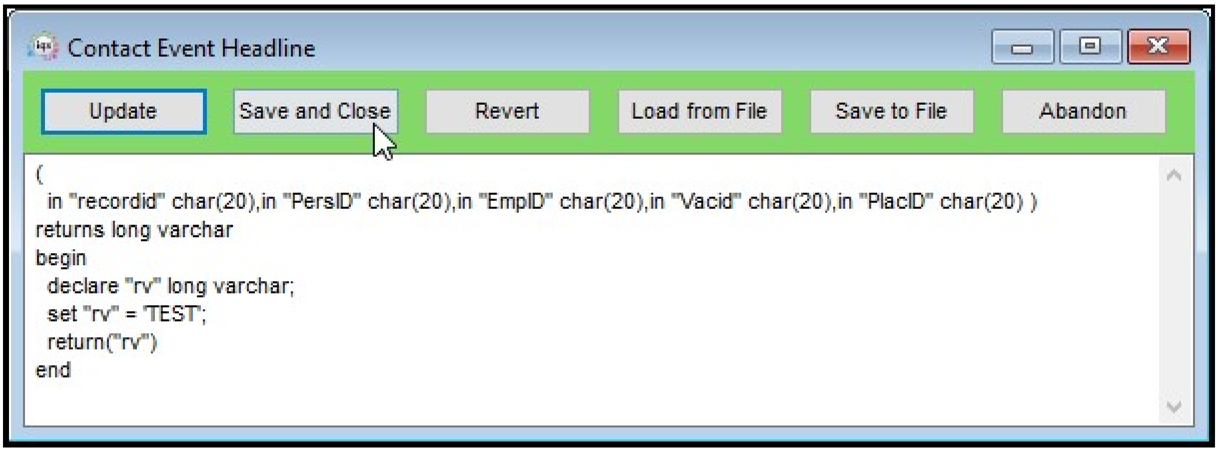


Headline available on Contact Events

A headline can now be added to Contact events. The Headline will appear in the top right window of the contact event.

The Headline Display size and Caption can be set up in Switchable Fields 3000 and 3002.

The Headline is specified in Database Functions – Headlines – Contact Event Headline.



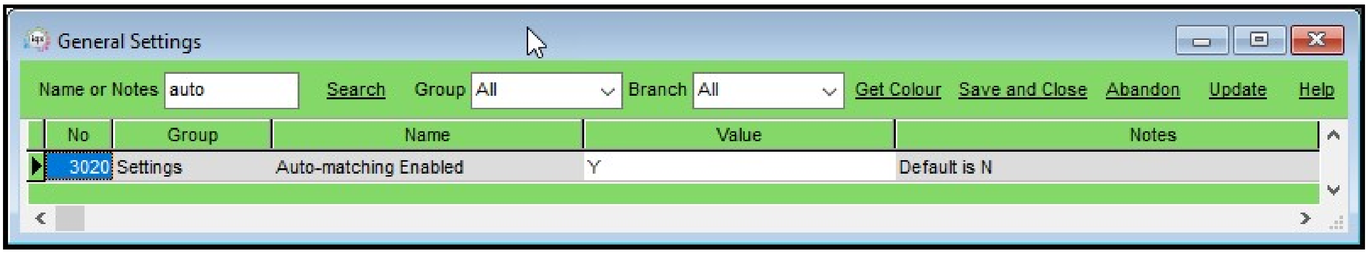
Auto-matching Candidates to Vacancies

Auto-matching can be used to automate the matching of candidates to vacancies and informing them of opportunities. The number and frequency of these communications can be controlled to maximise the benefit of this feature and allow candidates to specify acceptable settings.

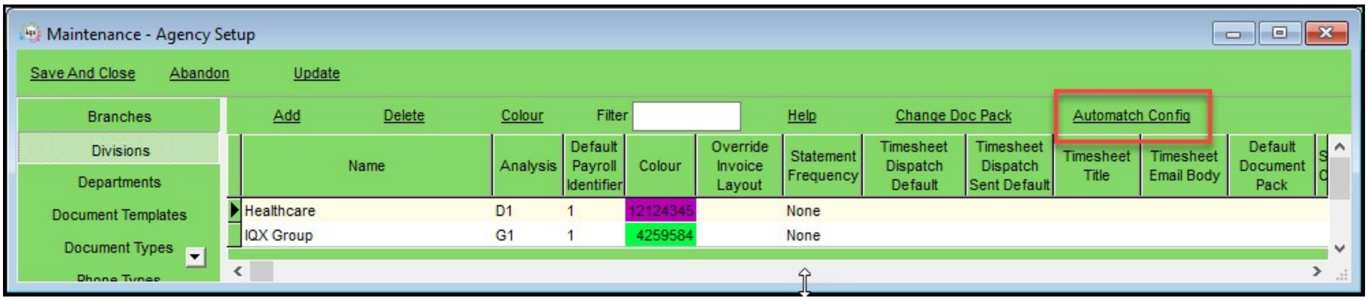
In addition, this feature can be controlled at Division and Temp Desk level. To use this feature will require a customised job which will be required for each agency to address their individual compliance and vacancy matching needs.

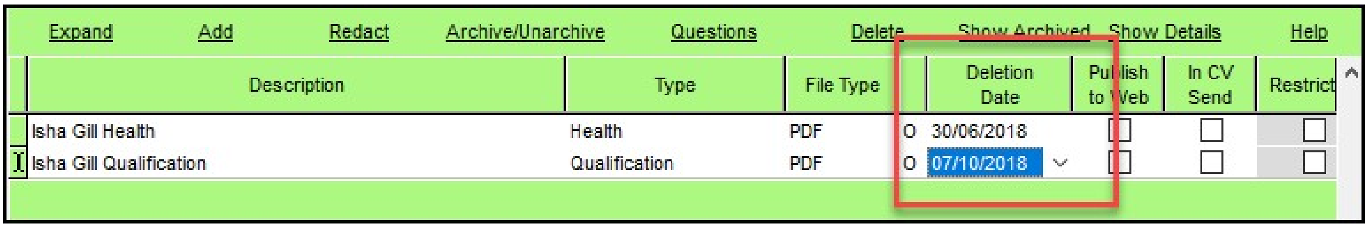
This job will be chargeable.

The Automatching Configuration views are enabled via General Settings - Settings 3020.

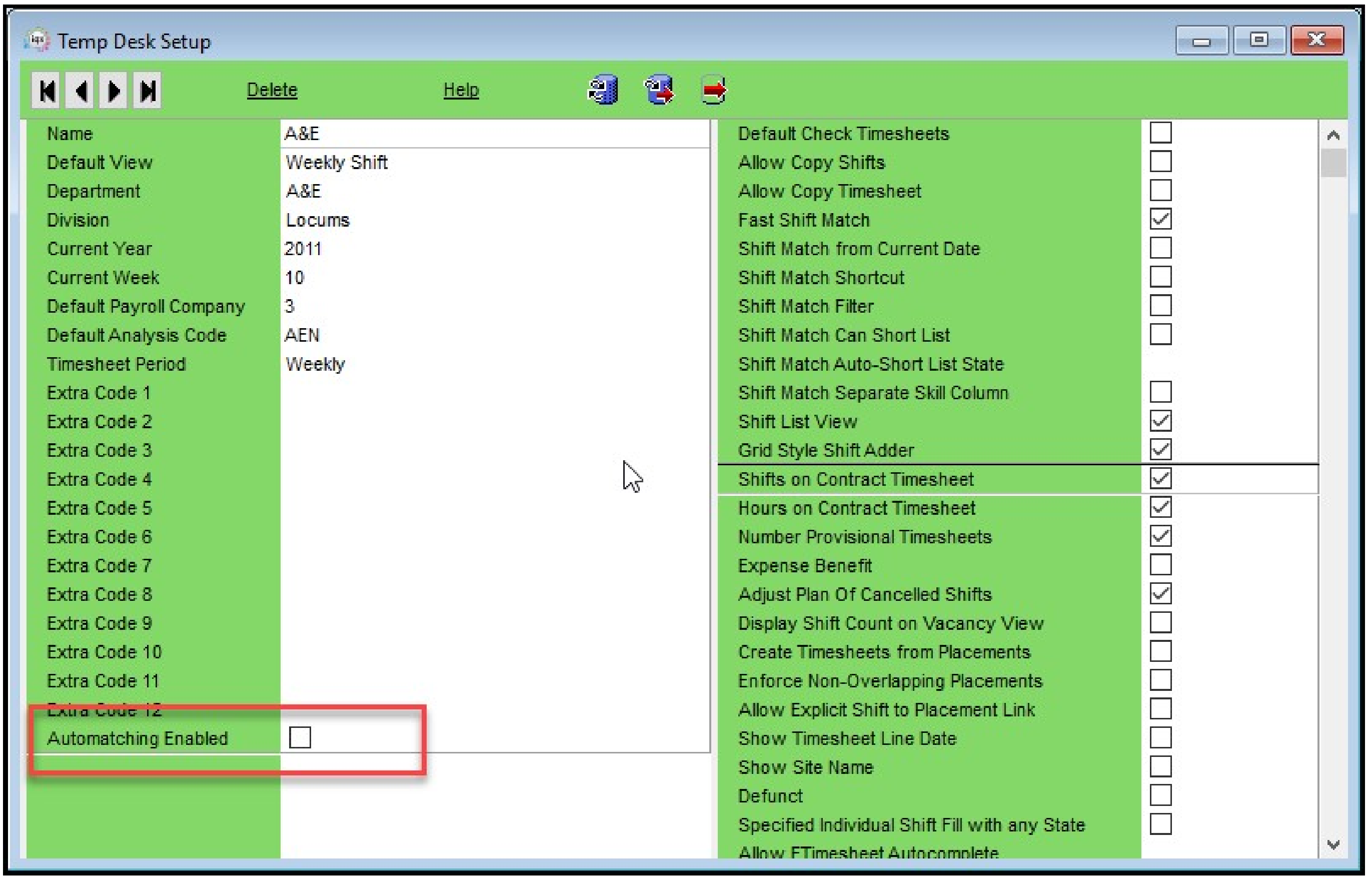


Auto-matching configuration can be enabled in Person and Division views.

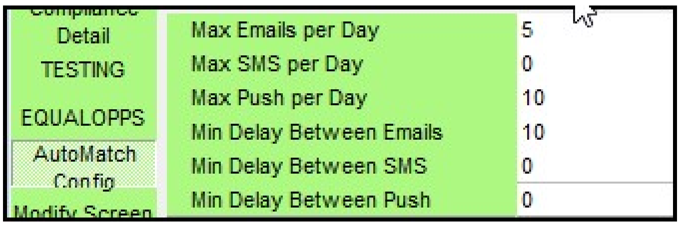




Automatching can be enabled individually for each Tempdesk.



AutoMatch configuration is visible in the Candidate record.

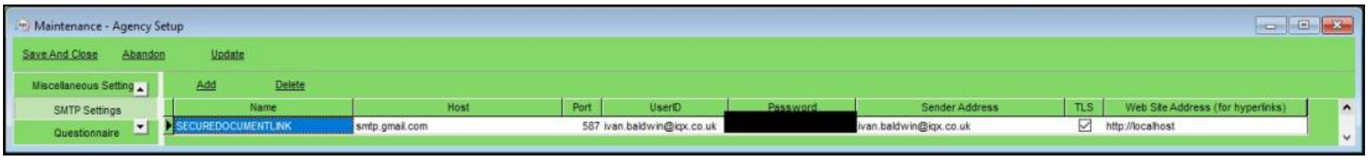


Secure service for sending out Data Access Requests (and other files) - Based on IQXHub

This feature arose from a need to improve the security of GDPR Access Report emailing. However, it can be used for the secure dispatch of any files from IQX.

To Set this feature up the following is required:

- IQXHub 5.2.22.1 or later. Database update must be allowed on first start.
- Updated IQXWeb.
- An SMTP link to be configured named SECUREDOCUMENTLINK.

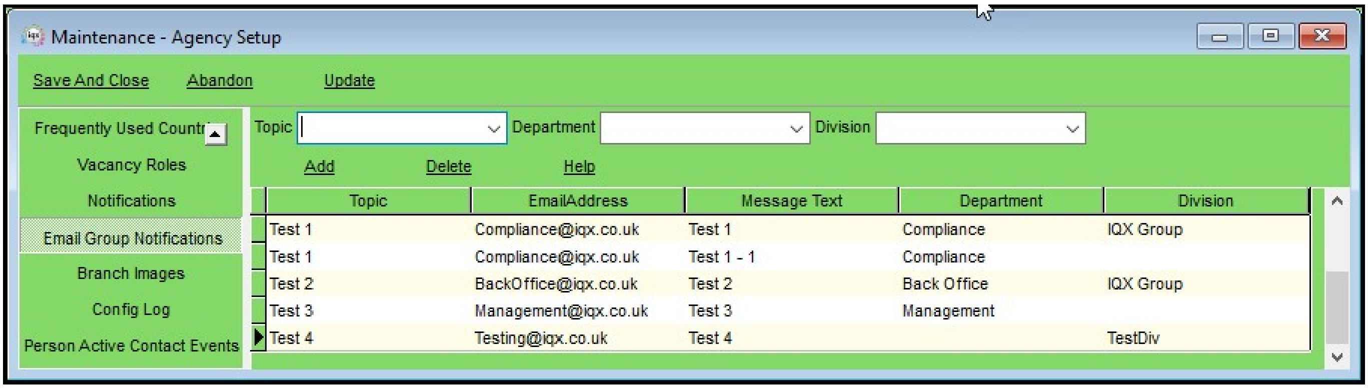


For IQXWeb and IQXHub please contact IQX to discuss costs associated with licensing these products.

Department / Division Email address types (IQX.exe and Web)

In preparation for group email notifications as an alternative mechanism to the current popup system a new view has been added to Maintenance – Agency
Setup called Email Group Notifications.

In this view Group Notifications can be specified along with group email addresses, message text and allocated by Department and Division.



It is possible to include hyperlinks in the message text of the email which when clicked will open the requested person form on the documents view.

Please speak to IQX support for assistance in designing the hyperlinks as a change will be required to the iqx.ini file and you will need a job to send the emails.

Peak BI Integration

A means of communicating with Peak BI has been added to allow candidates found using Peak to be added to IQX.

This service requires the updating of the IQX licence and populating of the settings shown below.

If licenced a new button will appear in Vacancy Shortlist.

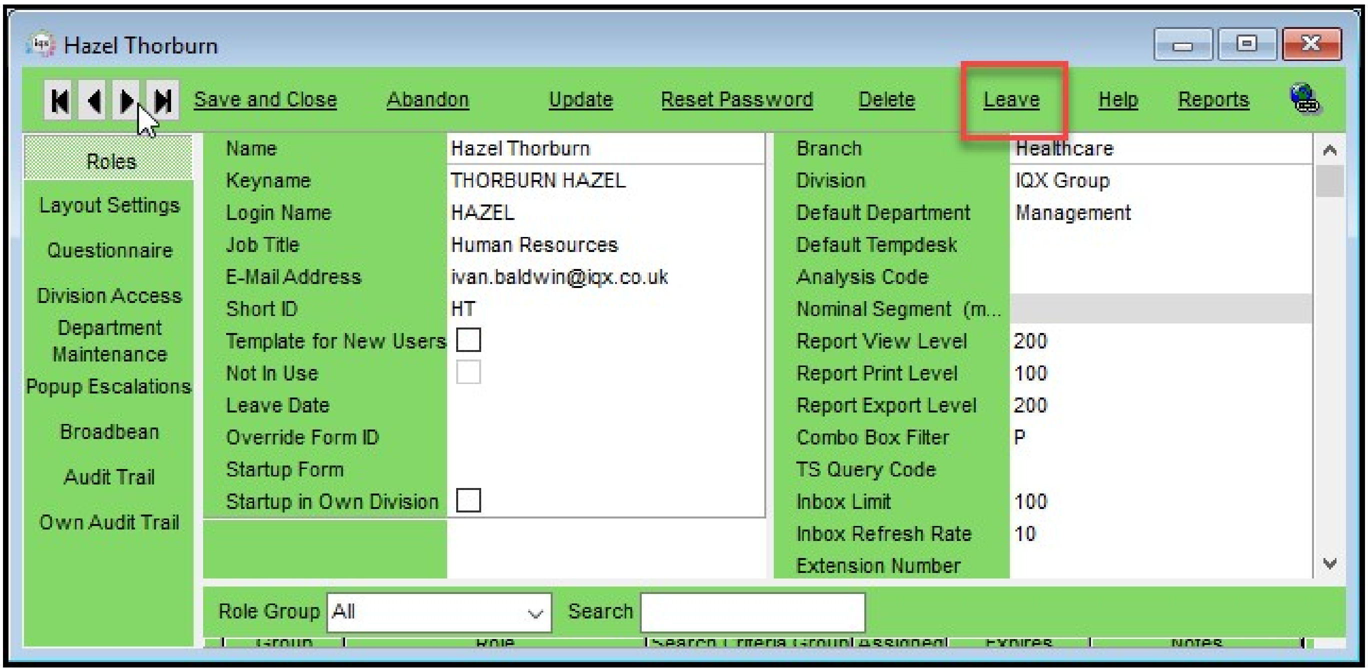
A job will be required to call data from Peak on a schedule.

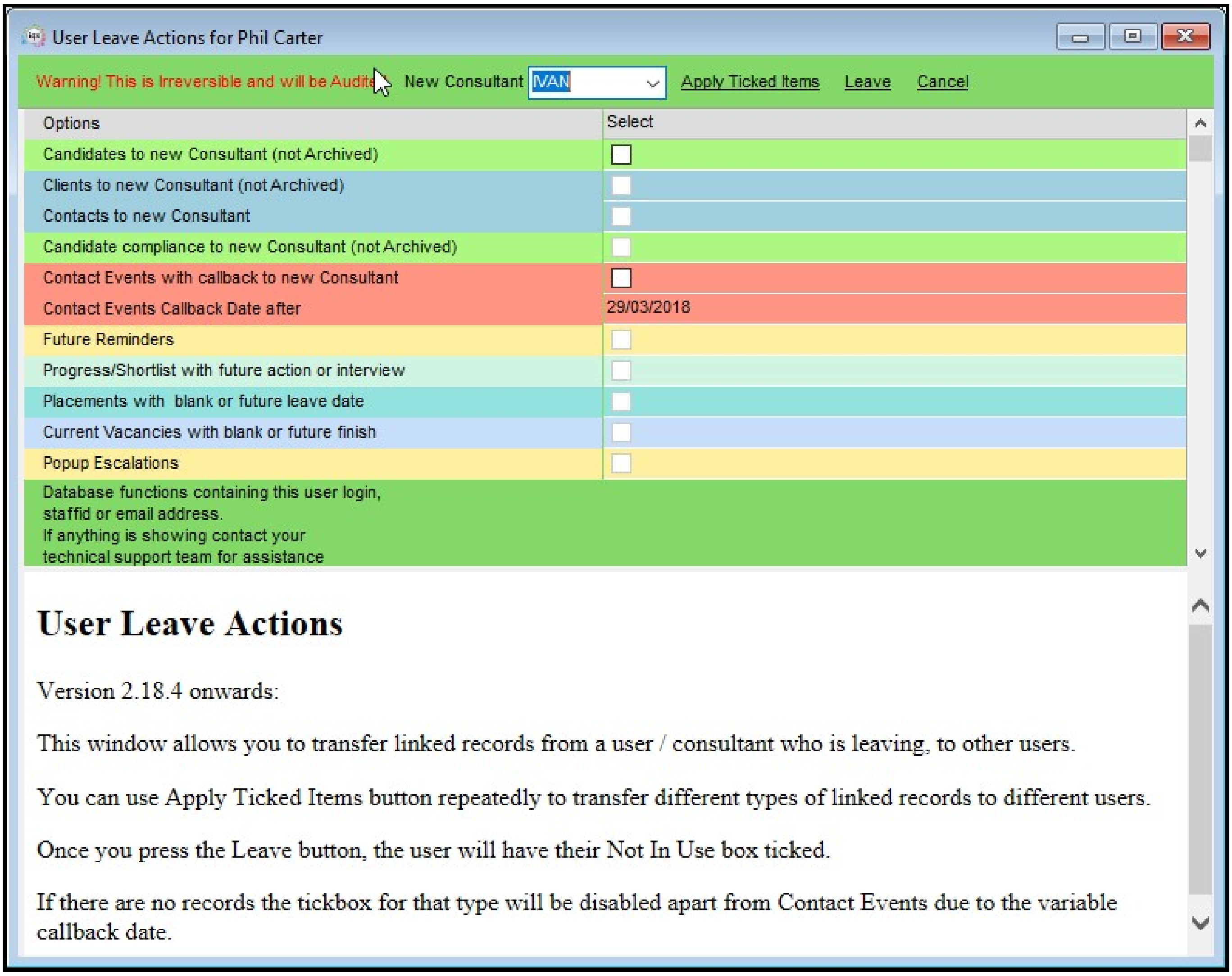
Please contact IQX for more information

Wizard for Tidying tasks on User leaving

When setting a User to Not in Use a Wizard is now available to re-allocate the now defunct User's outstanding responsibilities.

Click Leave and a new Wizard will appear.





Selecting the New Consultant from the drop down. Select the required responsibilities. Click Apply the ticked items and then change the New Consultant
as appropriate.

On completing the re-allocation click Leave.

Note: if an option has a faint tick box there are no records available for that option.

All changes will be audited in the Own Audit Trail of both the Leaving User and the User receiving their responsibilities.

If any database functions reference the leaving User's staffed these will be listed under Database functions in the wizard.

Add a programmable button to completed timesheet

It is now possible to add two programmable buttons to Completed timesheets. The buttons are specified in General Settings – Programmable Buttons.

20 Programmable Buttons	Timesheet Caption 1	Test this button
21 Programmable Buttons	Timesheet Script 1	
22 Programmable Buttons	Timesheet Visibility 1	R_accounts

Using the Visibility field, it is possible to specify which user role will see this button.

Accord Invoicing, Process NIRecharge First

When invoices are being processed in IQX if the connection between the Database server and the Accord server drops midway through the invoice process all timesheet lines won't be fully processed.

This could result in some timesheet lines being missed from an invoice.

IQX will now extract all the NiRecharge values (where applicable), and if the timesheets are not complete produce an error message before the document is processed rather than when the Accord link is dropped.

Maintenance pages new filter field for searching

A filter field for searching through long lists has been added to the following maintenance pages:

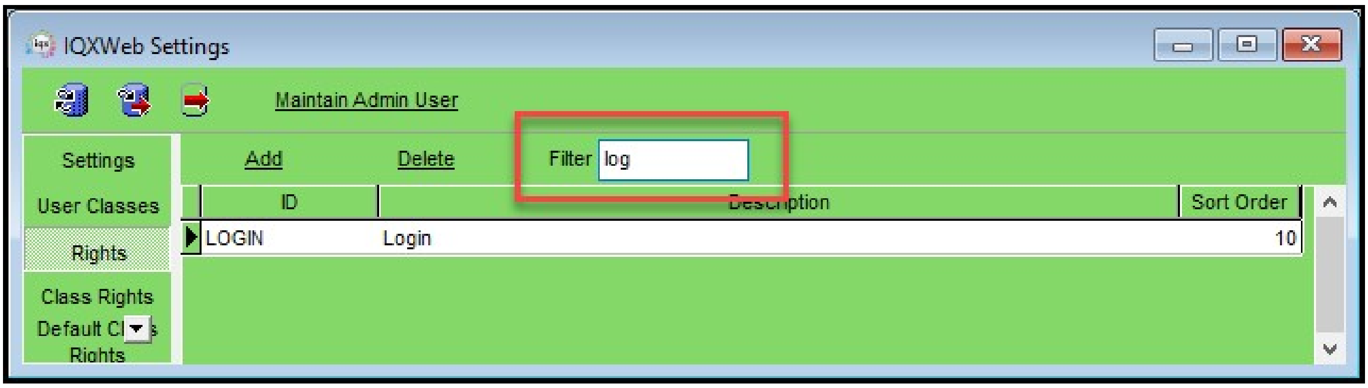
Agency Setup - Branches, Division, Departments, Boilerplate text, Email signatures, Contact event types, Contact event outcomes, Vacancy Job Titles, Sources, Frequently used Towns and Countries, Vacancy roles and Notifications.

Temps Setup - Paybands, Holidays (date) and Notifications.

Accounts Setup - Nominal codes and Nominal code segments.

Database Setup - Dictionary of Searchable data items, Custom word fields and Job runner schedules.

IQX Web Setup: - Settings, User Classes, Rights, Class Rights, Default Class Rights, Switches, Query Recipients, Reports, Page Text, Questionnaire Groups, Questionnaire Group Members and Documents.

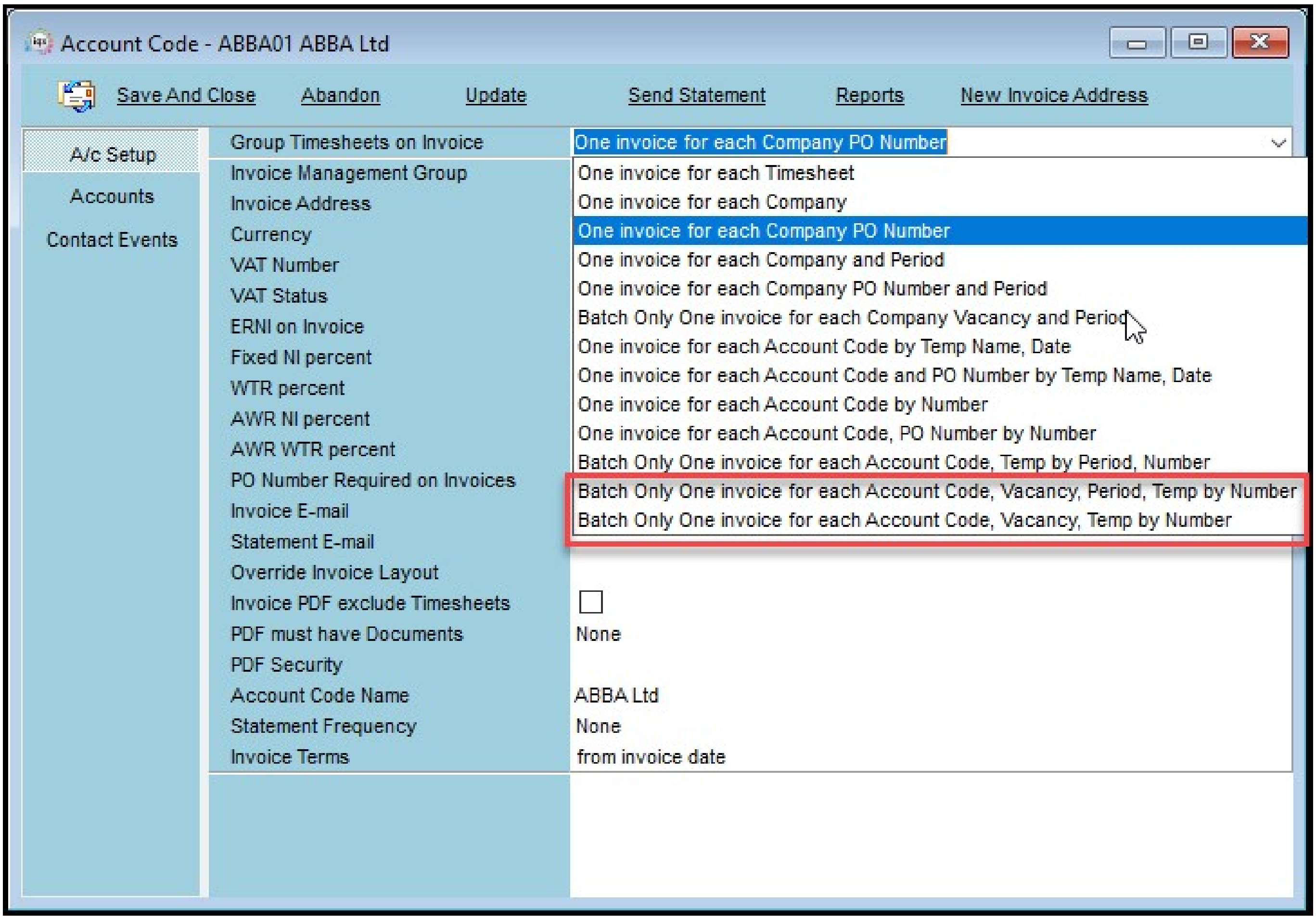


The filter automatically filters as text is added to the filter box.

2 new invoice groupings for batch invoicing

Two new batch only invoice groupings have been added to Company - A/c Setup - Group Timesheets on Invoice. These are:

- Batch Only One invoice for each Account Code, Vacancy, Temp by Number and
- Batch Only 1 invoice for each Account Code, Vacancy, Period, Temp by Number.



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Last update: **2018/10/08 12:02**