



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](#)
- [System Administrator](#)
- [Enhancements](#)
- [Fixes](#)

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.

Isha Gill - Add file

Document Type

File

Document Name

Publish To Web ☐

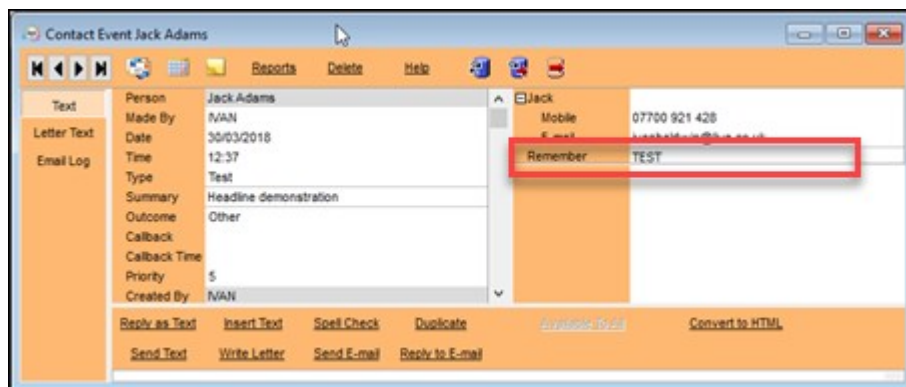
Deletion Date

Expand	Add	Redact	Archive/Unarchive	Questions	Delete	Show Archived	Show Details	Help
Description	Type	File Type	Deletion Date	Publish to Web	In CV Send	Restrict		
Isha Gill Health	Health	PDF	0 30/06/2018	☐	☐	☐		
Isha Gill Qualification	Qualification	PDF	0 07/10/2018	☐	☐	☐		

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.

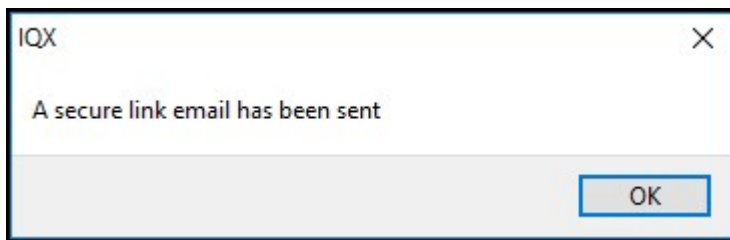
Compliance	Max Emails per Day	5
Detail	Max SMS per Day	0
TESTING	Max Push per Day	10
EQUALOPPS	Min Delay Between Emails	10
AutoMatch	Min Delay Between SMS	0
Config	Min Delay Between Push	0
Modify Screen		

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.

Secure Document Download

Please check your email for the password and enter it below.

This password will also be required to open the downloaded zip file.

Password

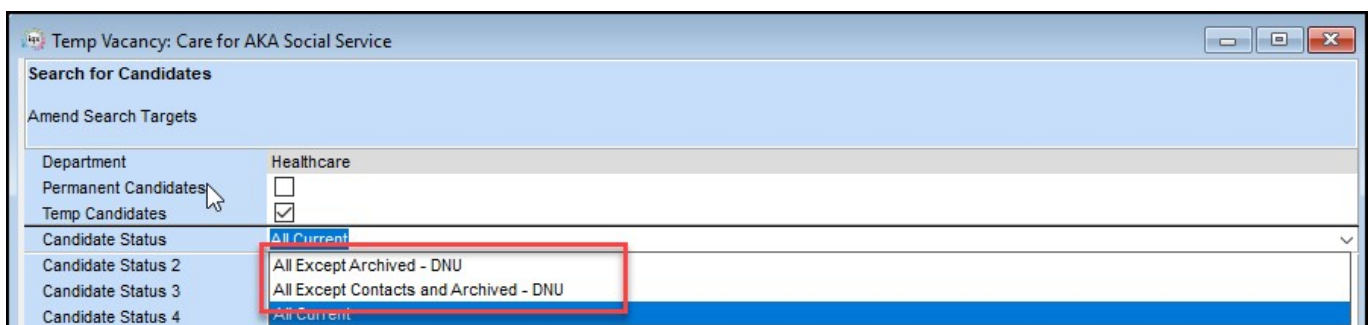
In addition, it will then generate a new email containing the password. This password will both download the zip file and allow the candidate to open the password protected file.

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.

Our Ref.	Date	From	To	Description	Person	Cancelled	Cancel Reason	Client Confirmed	Confirmed With	Temp Confirmed	Their Ref.	Grade	Note	Send Query	Notify Client	Notify Temp
15...	Mon 26/03/2018	09:00	09:30	Morning Care Visit	Holden, Nate	☐		☐		☒		A		☐	☐	☐
15...	Tue 27/03/2018	09:00	09:30	Morning Care Visit	Holden, Nate	☐		☐		☒		A		☐	☐	☐
15...	Wed 28/03/2018	09:00	09:30	Morning Care Visit	Holden, Nate	☐		☐		☒		A		☐	☐	☐

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.

Nominal	Description	VAT Rate	Amount
		Standard	.00

Gross 0.00 VAT 0.00 Amount 0.00

Invoice Layout
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.

The screenshot shows the 'Oliwia Bonilla' record in the 'Vacancy - Shortlist' window. The 'Select' button in the top toolbar is highlighted with a red box. The record details are as follows:

Temp	Division	Infrastructure	Headline
Contact Events	Name	Oliwia Bonilla	Alert
Compliance	State	Current	Reg. Departments
Perm	Available From		Industrial (Perm+Temp)
Accounts	Personal	Female 61	Dept. Questionnaire
	Home Phone	01632 894 287	Position Sought
	Day Phone		Salary wanted
			Key Skills
			FLT, Food

The screenshot shows the 'Temp Vacancy: Driver for ABBA Ltd' window. The 'Candidate' button in the bottom toolbar is highlighted with a red box. The record details are as follows:

Company	ABBA Ltd
Contact	Charlotte Morton
Job Title	Driver
No. of Posts	1
PO Number	
Dates	From 01/03/2017
Pay / Charge	12.50 / 18.23
Status / Codes	Current / Our Ref: 2063 / Contract Ref: CHECK
Dept./Desk/Con...	Industrial / Demo - Construction ABC / IVAN
Client Department	
Headline	Test
AWR Role	
T&C's Sent	
Vision Type	Daily

Buttons: Search, Add, Remove, Send Pack, Send Details, Send CVs, Placement, Copy Short List, Show Previous State, Select All

Buttons: Expand, Not Finished, Process, Process Candidates, Candidate, Exclusive

Candidate	Consultant	Action Date	Progress State	Person State	Rejection Reason	Interview	Time	Notes	Prty	Last Position	Exc.	Select
Serena Bell	IVAN	08/03/2018	Awaits Co...	Current					5	Piling Group PL...	N	☐
Oliwia Bonilla	IVAN	08/03/2018	Awaits Co...	Current					5		N	☐

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.



Candidate	Consultant	Action Date	Progress State	Person State	Rejection Reason	Interview	Time	Notes	Prty	Last Position	Exc.	Select
Serena Bell	IVAN	08/03/2018	Awaits Co...	Current					5	Pilling Group PL...	N	☐
Olivia Bonilla	IVAN	08/03/2018	Awaits Co...	Current					5		N	☒

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>

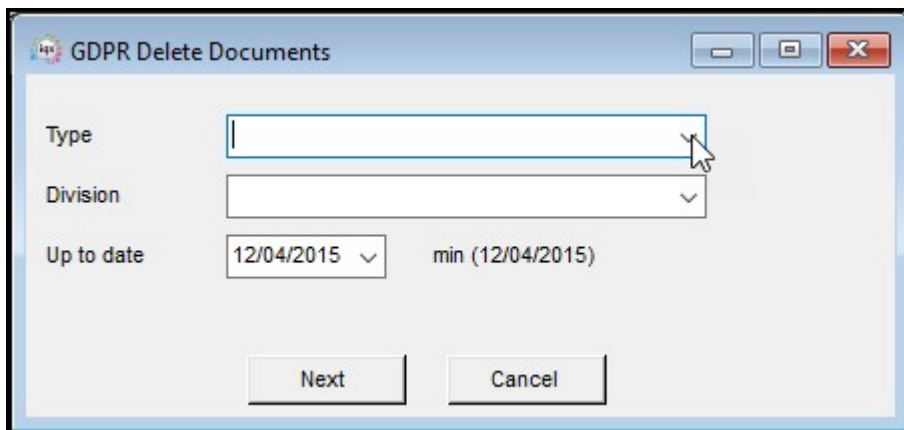
GDPR - Job to delete historic documents in bulk

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.

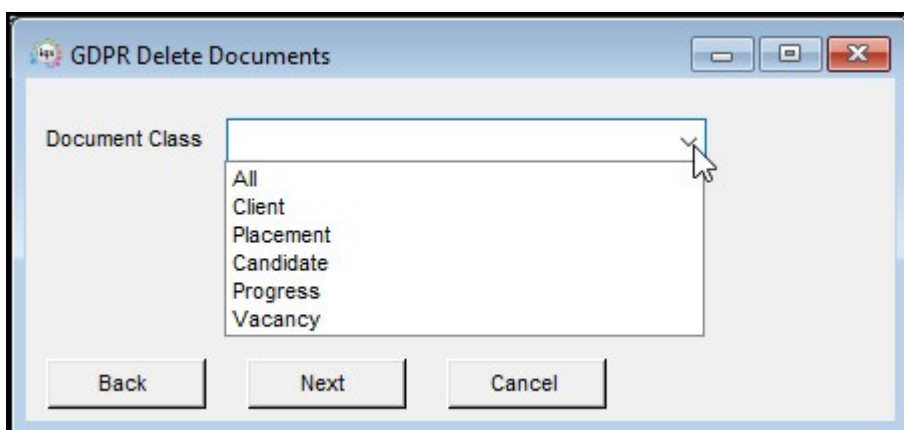
Bulk Deletion of Documents

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

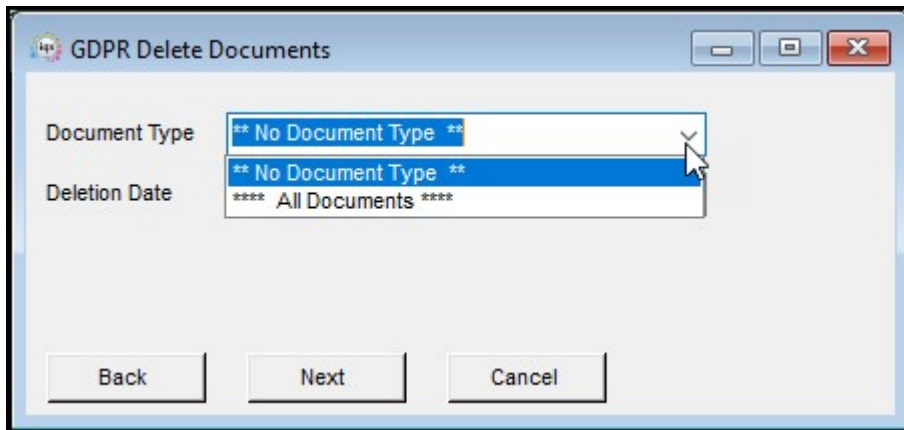


Select the document type (CVs, Contact Event letters and Documents) from the drop down and if applicable select the Division.

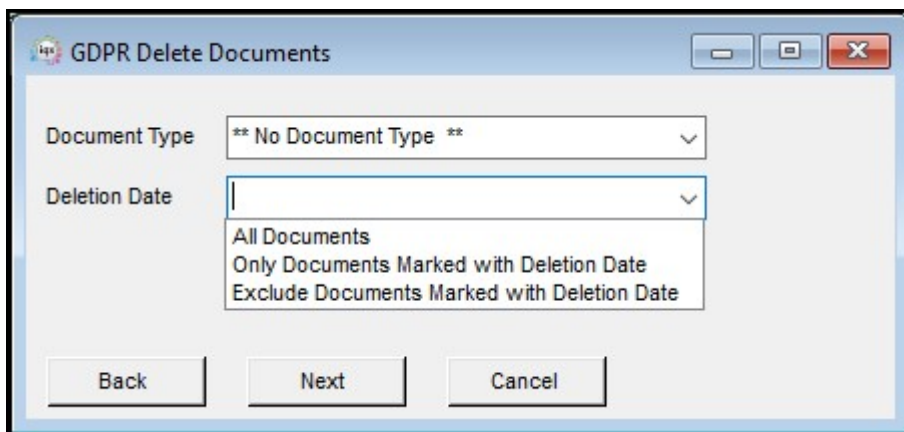
The deletion date has been set to a minimum of three years prior to the current date to protect recent documents.



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



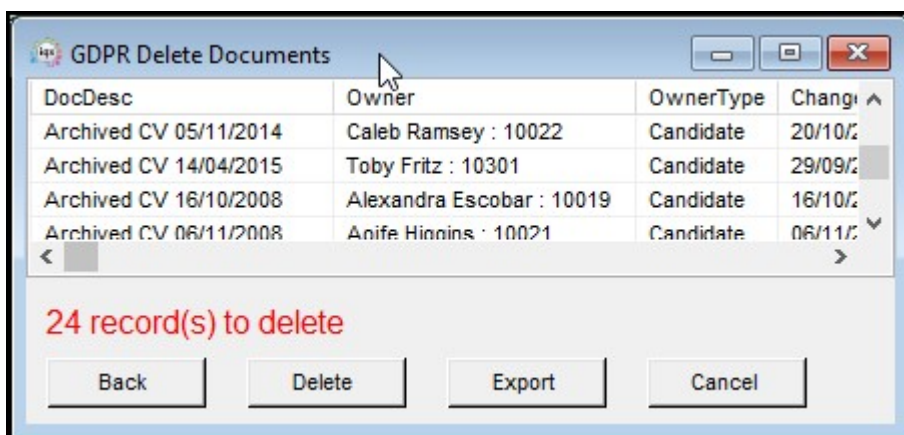
The next screen asks you to select the document type and the deletion date. If you select **No Document Type** this will remove documents that have been added without a document type being selected.



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.



DocDesc	Owner	OwnerType	Change
Archived CV 05/11/2014	Caleb Ramsey : 10022	Candidate	20/10/2014
Archived CV 14/04/2015	Toby Fritz : 10301	Candidate	29/09/2015
Archived CV 16/10/2008	Alexandra Escobar : 10019	Candidate	16/10/2008
Archived CV 06/11/2008	Anife Hinnins : 10021	Candidate	06/11/2008



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.

Role Group

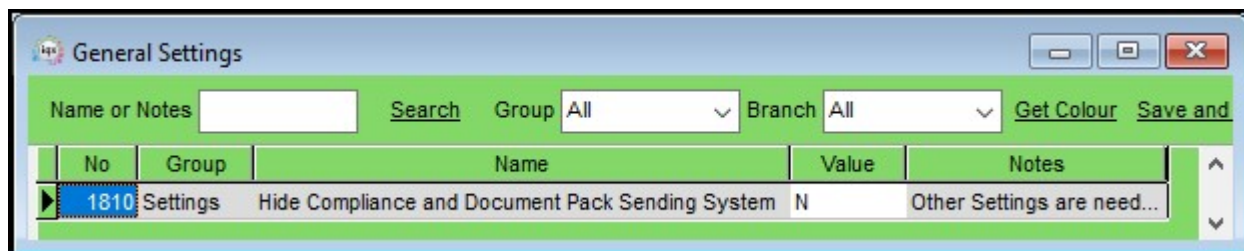
GENERAL

Search

compliance

Group	Role	Search Criteria Group	Assigned	Expires	Notes
GENERAL	Can maintain Clearance/Compliance		☐		
GENERAL	Can maintain Compliance Docs		☐		Without document packs being on (overrides...

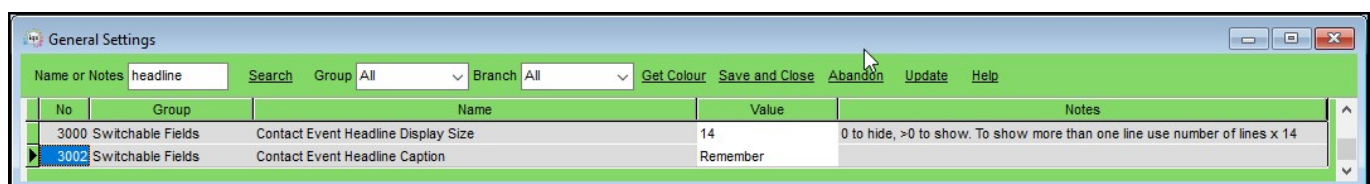
Note: This role is for agencies who have no user with 'Can maintain Clearance/Compliance' switched on and General Settings - Settings 1810 is set to N.



No	Group	Name	Value	Notes
1810	Settings	Hide Compliance and Document Pack Sending System	N	Other Settings are need...

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.



No	Group	Name	Value	Notes
3000	Switchable Fields	Contact Event Headline Display Size	14	0 to hide, >0 to show. To show more than one line use number of lines x 14
3002	Switchable Fields	Contact Event Headline Caption	Remember	

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.



Window: Contact Event Headline

Buttons: Update, Save and Close, Revert, Load from File, Save to File, Abandon

```
(
  in "recordid" char(20),in "PersID" char(20),in "EmplID" char(20),in "Vacid" char(20),in "PlacID" char(20) )
returns long varchar
begin
  declare "rv" long varchar;
  set "rv" = 'TEST';
  return("rv")
end
```

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.

Window: General Settings

Search: auto | Group: All | Branch: All | Get Colour | Save and Close | Abandon | Update | Help

No	Group	Name	Value	Notes
3020	Settings	Auto-matching Enabled	Y	Default is N

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

Window: Maintenance - Agency Setup

Buttons: Save And Close, Abandon, Update

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

Table:

Name	Analysis	Default Payroll Identifier	Colour	Override Invoice Layout	Statement Frequency	Timesheet Dispatch Default	Timesheet Dispatch Sent Default	Timesheet Title	Timesheet Email Body	Default Document Pack
Healthcare	D1	1	12124345	None						
IQX Group	G1	1	4259584	None						

Buttons: Add, Delete, Colour, Filter, Help, Change Doc Pack, **Automatch Config**



Expand	Add	Redact	Archive/Unarchive	Questions	Delete	Show Archived	Show Details	Help
Description	Type	File Type	Deletion Date	Publish to Web	In CV Send	Restrict		
Isha Gill Health	Health	PDF	0 30/06/2018	☐	☐	☐		
Isha Gill Qualification	Qualification	PDF	0 07/10/2018	☐	☐	☐		

Automatching can be enabled individually for each Tempdesk.

Temp Desk Setup

Delete Help

Name	A&E	Default Check Timesheets	☐
Default View	Weekly Shift	Allow Copy Shifts	☐
Department	A&E	Allow Copy Timesheet	☐
Division	Locums	Fast Shift Match	☒
Current Year	2011	Shift Match from Current Date	☐
Current Week	10	Shift Match Shortcut	☐
Default Payroll Company	3	Shift Match Filter	☐
Default Analysis Code	AEN	Shift Match Can Short List	☐
Timesheet Period	Weekly	Shift Match Auto-Short List State	☐
Extra Code 1		Shift Match Separate Skill Column	☐
Extra Code 2		Shift List View	☒
Extra Code 3		Grid Style Shift Adder	☒
Extra Code 4		Shifts on Contract Timesheet	☒
Extra Code 5		Hours on Contract Timesheet	☒
Extra Code 6		Number Provisional Timesheets	☒
Extra Code 7		Expense Benefit	☐
Extra Code 8		Adjust Plan Of Cancelled Shifts	☒
Extra Code 9		Display Shift Count on Vacancy View	☐
Extra Code 10		Create Timesheets from Placements	☐
Extra Code 11		Enforce Non-Overlapping Placements	☐
Extra Code 12		Allow Explicit Shift to Placement Link	☐
Automatching Enabled	☐	Show Timesheet Line Date	☐
		Show Site Name	☐
		Defunct	☐
		Specified Individual Shift Fill with any State	☐
		Allow FTimesheet Autocomplete	☐

AutoMatch configuration is visible in the Candidate record.

Compliance	Max Emails per Day	5
Detail	Max SMS per Day	0
TESTING	Max Push per Day	10
EQUALOPPS	Min Delay Between Emails	10
AutoMatch	Min Delay Between SMS	0
Config	Min Delay Between Push	0
Modify Screen		

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.

Name	Host	Port	UserID	Password	Sender Address	TLS	Web Site Address (for hyperlinks)
SECUREDOCUMENTLINK	smtp.gmail.com	587	ivan.baldwin@iqx.co.uk	[Masked]	ivan.baldwin@iqx.co.uk	☒	http://localhost

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.

Topic	EmailAddress	Message Text	Department	Division
Test 1	Compliance@iqx.co.uk	Test 1	Compliance	IQX Group
Test 1	Compliance@iqx.co.uk	Test 1 - 1	Compliance	IQX Group
Test 2	BackOffice@iqx.co.uk	Test 2	Back Office	IQX Group
Test 3	Management@iqx.co.uk	Test 3	Management	TestDiv
Test 4	Testing@iqx.co.uk	Test 4		

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.

3040 Settings	Display Photo on Person	
3050 Settings	URL for Peak Search	Only applicable to Peak integrated systems. Change
3051 Settings	Key for Peak Search	Only applicable to Peak integrated systems. Change
3060 Settings	Progress State for Candidates added...	Only applicable to Peak integrated systems

If licenced a new button will appear in Vacancy Shortlist.



Search Add Remove Send Pack Send Details Send CVs Placement Copy Short List Client Contract Candidate Contract Select All

Expand Not Finished Process Process Candidates Candidate Exclusive Cloud Search

Candidate	Consultant	Action Date	Progress State	Person State	Rejection Reason	Interview	Time	Notes	Prty	Last Position	Exc.	Score	Sele
-----------	------------	-------------	----------------	--------------	------------------	-----------	------	-------	------	---------------	------	-------	------

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.

Hazel Thorburn

Save and Close Abandon Update Reset Password Delete Leave Help Reports

Roles	Name	Branch
Layout Settings	Keyname THORBURN HAZEL	Healthcare
Questionnaire	Login Name HAZEL	IQX Group
Division Access	Job Title Human Resources	Management
Department	E-Mail Address ivan.baldwin@iqx.co.uk	
Maintenance	Short ID HT	
Popup Escalations	Template for New Users ☐	
Broadbean	Not In Use ☐	
Audit Trail	Leave Date	
Own Audit Trail	Override Form ID	
	Startup Form	
	Startup in Own Division ☐	

Report View Level 200

Report Print Level 100

Report Export Level 200

Combo Box Filter P

TS Query Code

Inbox Limit 100

Inbox Refresh Rate 10

Extension Number

Role Group All Search



User Leave Actions for Phil Carter

Warning! This is Irreversible and will be Audited. New Consultant: Apply Ticked Items Leave Cancel

Options	Select
Candidates to new Consultant (not Archived)	☐
Clients to new Consultant (not Archived)	☐
Contacts to new Consultant	☐
Candidate compliance to new Consultant (not Archived)	☐
Contact Events with callback to new Consultant	☐
Contact Events Callback Date after	29/03/2018
Future Reminders	☐
Progress/Shortlist with future action or interview	☐
Placements with blank or future leave date	☐
Current Vacancies with blank or future finish	☐
Popup Escalations	☐
Database functions containing this user login, staffid or email address. If anything is showing contact your technical support team for assistance	

User Leave Actions

Version 2.18.4 onwards:

This window allows you to transfer linked records from a user / consultant who is leaving, to other users.

You can use Apply Ticked Items button repeatedly to transfer different types of linked records to different users.

Once you press the Leave button, the user will have their Not In Use box ticked.

If there are no records the tickbox for that type will be disabled apart from Contact Events due to the variable callback date.

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:

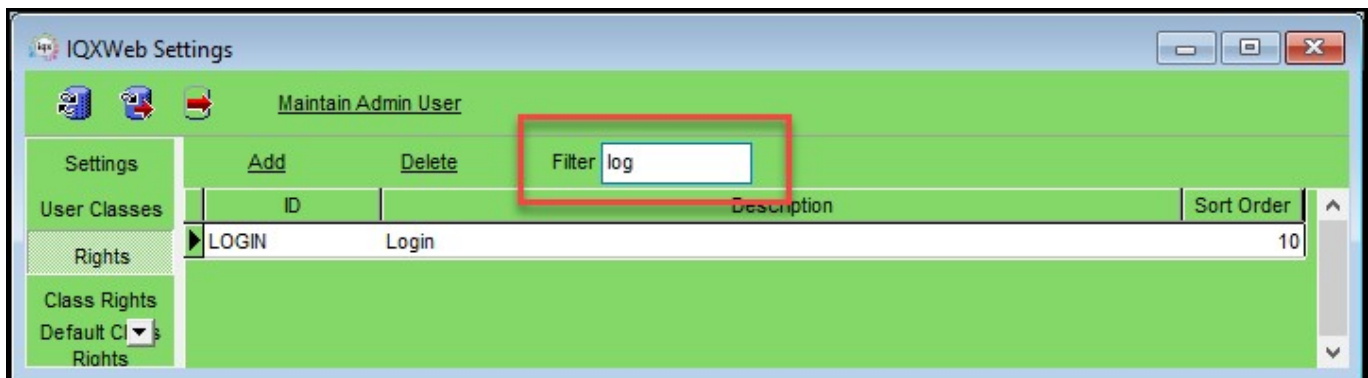
Agency Setup - Branches, Division, Departments, Boilerplate text, Email signatures, Contact event types, Contact event outcomes, Vacancy Job Titles, Sources, Frequently used Towns and Countries, Vacancy roles and Notifications.

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.

Account Code - ABBA01 ABBA Ltd

Save And Close Abandon Update Send Statement Reports New Invoice Address

A/c Setup Group Timesheets on Invoice One invoice for each Company PO Number

Accounts Invoice Management Group One invoice for each Timesheet

Contact Events Invoice Address One invoice for each Company

Currency One invoice for each Company PO Number

VAT Number One invoice for each Company and Period

VAT Status One invoice for each Company PO Number and Period

ERNI on Invoice Batch Only One invoice for each Company Vacancy and Period

Fixed NI percent One invoice for each Account Code by Temp Name, Date

WTR percent One invoice for each Account Code and PO Number by Temp Name, Date

AWR NI percent One invoice for each Account Code by Number

AWR WTR percent One invoice for each Account Code, PO Number by Number

PO Number Required on Invoices Batch Only One invoice for each Account Code, Temp by Period, Number

Invoice E-mail Batch Only One invoice for each Account Code, Vacancy, Period, Temp by Number

Statement E-mail Batch Only One invoice for each Account Code, Vacancy, Temp by Number

Override Invoice Layout

Invoice PDF exclude Timesheets ☐

PDF must have Documents None

PDF Security

Account Code Name ABBA Ltd

Statement Frequency None

Invoice Terms from invoice date

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

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release_2.18.4&rev=1525258879

Last update: 2018/05/02 11:01

