Release 2.18.6

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.

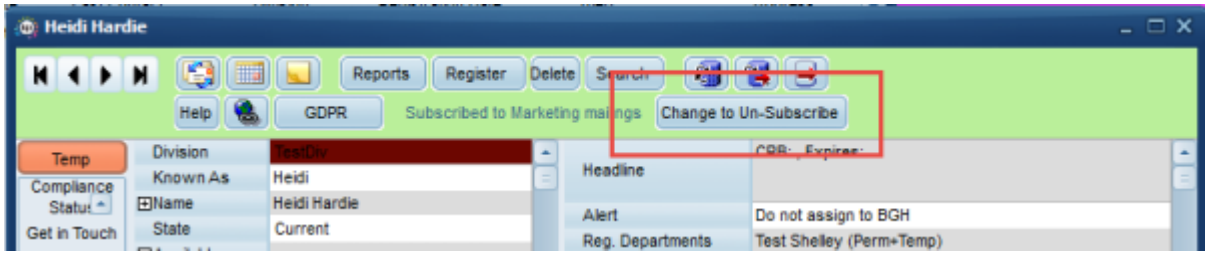
- User
- System Administrator
- Enhancements
- Fixes

User

Features

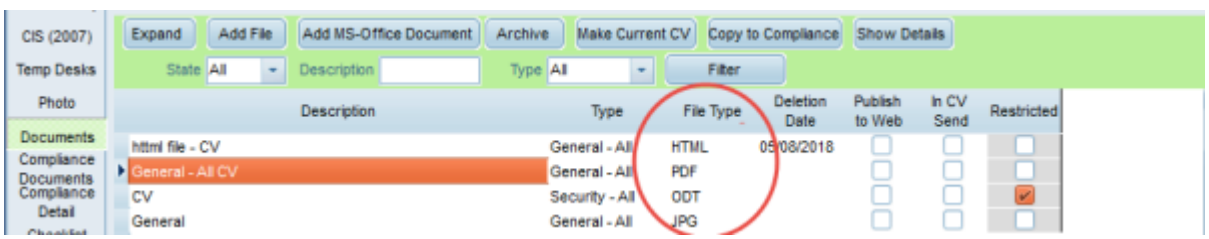
Move Subscribe options to Person header

The button to subscribe or unsubscribe candidates from marketing is now positioned in the header of the person record. If a candidate is set to Unsubscribe to Marketing Mailers then then they will not appear on mailing lists.



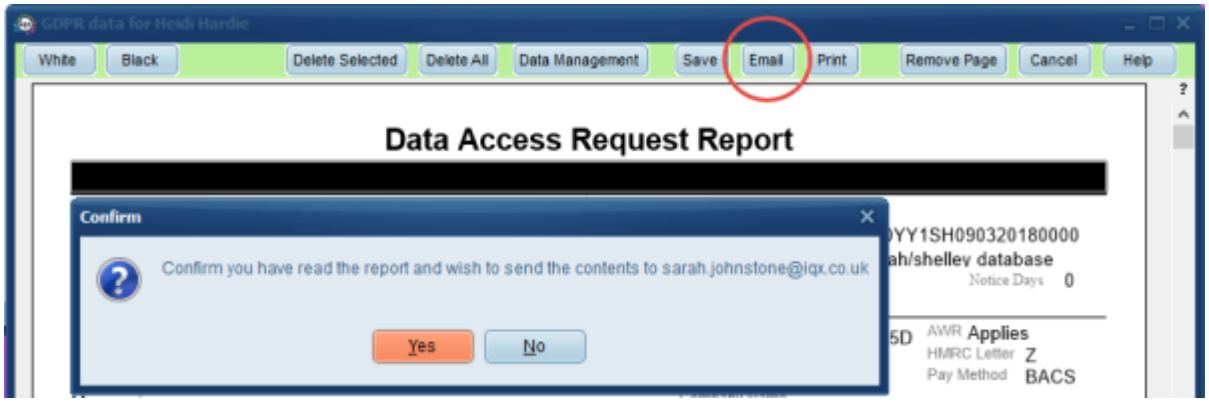
Documents to display html and text files

Within the documents tab you can now upload html files as well as standard text files, PDFs and JPGs. The file type will be displayed as circled below.



GDPR Send Data Request - Email cancellation step

When sending a Data Access report there is now a pop up box which appears to confirm that you are happy that you have read the report in full and redacted where necessary.



Postcode Lookup on Reference Request and Fast New wizard

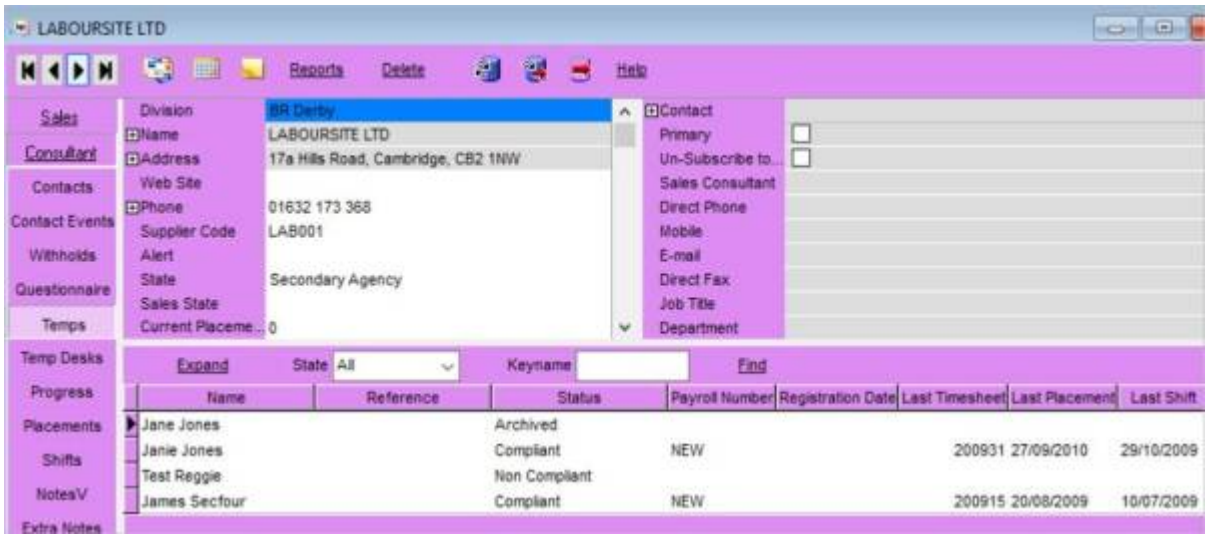
When sending a reference request, it is now possible to lookup the address using the postcode, in the same way as when adding a new candidate, rather than free-tying the address every time. Postcode lookup is an add-in module for IQX and you must have this enabled to use this function. To learn more about Postcode Lookup please get in touch with our support team on support@iqx.co.uk.

Date of Birth Validation

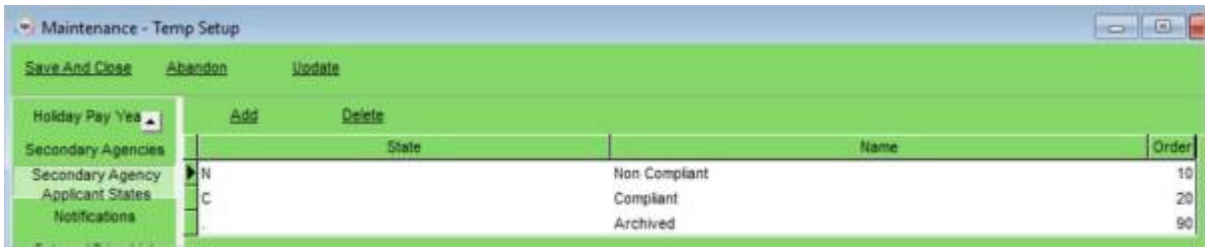
It is now possible to add a validation to endure a new temp's date of birth is checked before they complete registration or are placed. This can be set up using your custom guidelines. Please register your interest in this feature by contacting the support team.

Secondary Agency form improvements - Candidate and Company

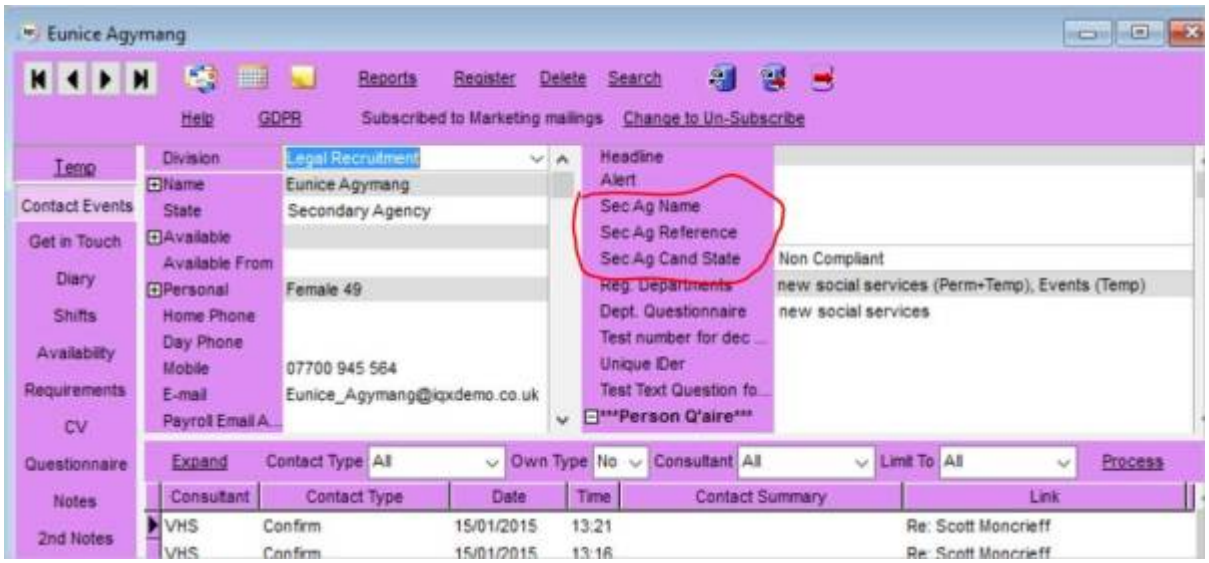
Secondary Agency CANDIDATE enhancements: With regards to the Compliance State, Secondary Agencies can now have compliance states (set up in Temp Setup, Secondary Agency Candidate States) so that the Agency can check the candidate's documents, etc. before they are given a booking (Pre-Validation functions will also have to be adjusted – contact IQX) – eg Non-Compliant, Complaint, Archived. This is seen in the top right hand section of the Person form. All Secondary candidates will need to be updated.



Form Layout Enhancments The Secondary Agency Name, Reference and Candidate State are all now immediately visible in the top right hand section instead of having to scroll down on the left hand top section.

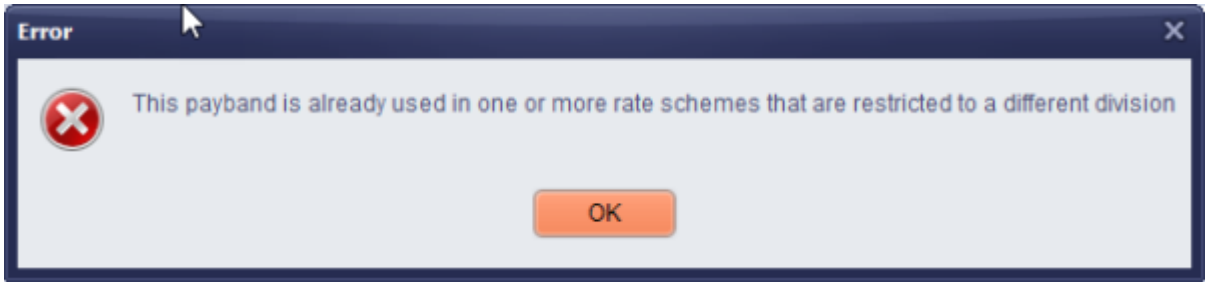


The changes to the secondary agency client form shows the Temps list and Temp Desks together, further up the left hand menu. The Temps view has a State filter and can find Temps by a keyname search



Prevention of using a Payband limited to a division

If a Division has been attached to a payband and it is being used in a rate Rate Scheme the divisions must match. If they do not match an error message will appear warning you that the combination cannot be used.



The paybands will not be available for selection at the Add rate stage on a vacancy, placement or timesheet. This requires no set up.

Timesheet Image rotation saved

When a timesheet is rotated it will automatically save when you close the time sheet so that the next time you open the time sheet image it will have remembered the orientation.

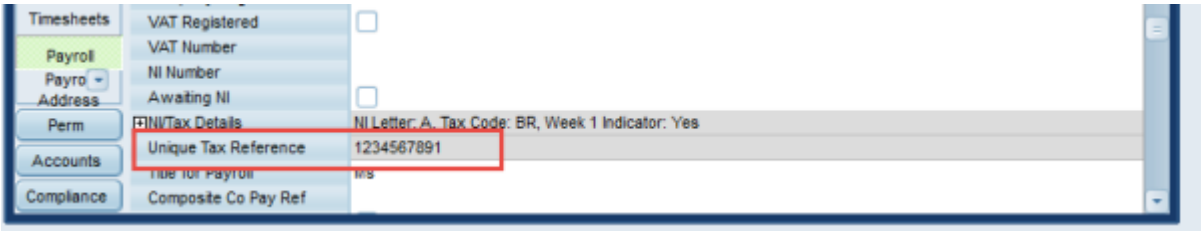
Statements will use IQX Email signature

The default IQX email signature is now added to the emailed credit control statement. This also applies to statements and invoices.

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

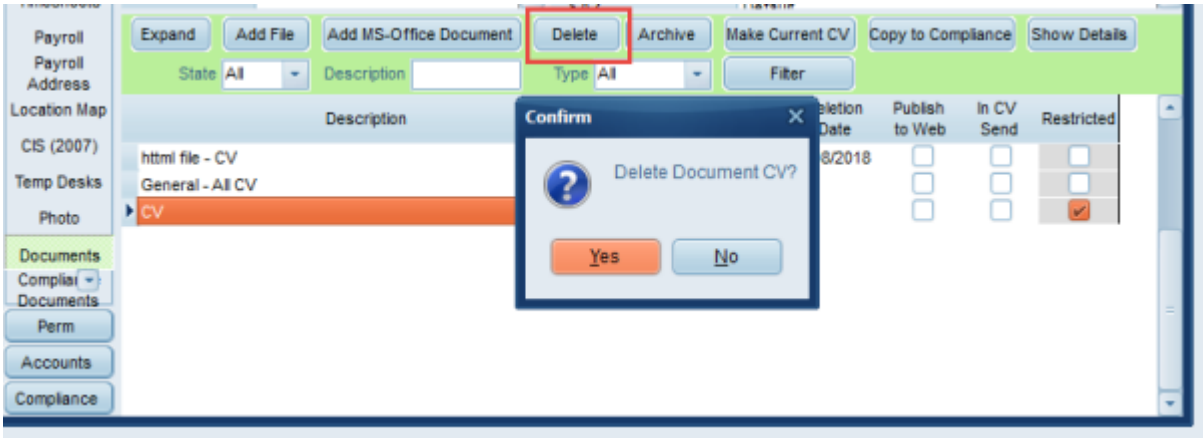
Adding a unique Tax Reference to a person record

A candidates Unique Tax Number can now be viewed under the Payroll tab (this needs to be switched on by your system admin). Please Note: Although the UTR can now be viewed under the Payroll tab, it can only be edited here if your Agency is not set to use CIS. If CIS is set the UTR can only be edited under the CIS view.



Role to be able to Delete Documents

It is now possible to assign the role to allow a user to delete documents from records including Person, compliance, company, vacancy, progress and placement documents. If this role is assigned (this can only be done by your system admin) then the delete button will appear as shown below. Once you have clicked the delete button, the pop up will appear to allow you to select yes or no. If you do not have this role assigned then the button will not be visible.



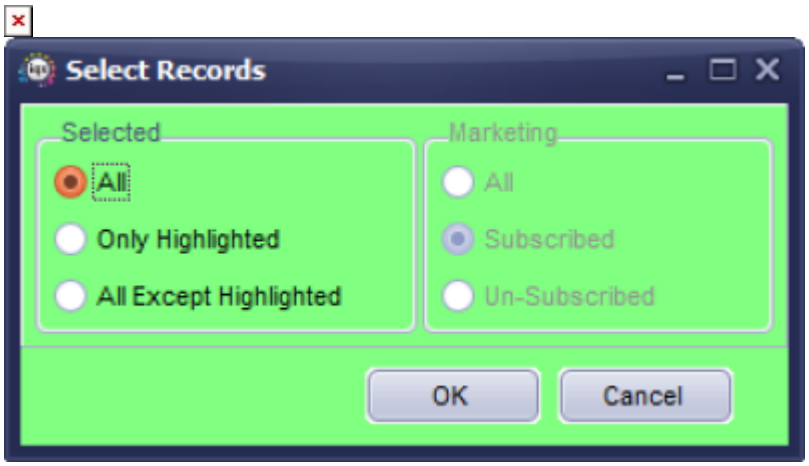
State Visibility and Consent Management

This functionality allows you to restrict access to old candidates who have worked for your Agency, therefore should not be deleted, but might have refused consent for future work, or the agency wishes to keep separate and un-contactable for GDPR reasons.
There is a new user role of Data Protection Manager - this must only be given to a user who will be allowed to see the hidden data, for re-activation or other internal purpose. A Person state is selected or created for this section of data and for all users except Data Protection Manager that state will never be searchable in the person selector, or vacancy short list search. If a record is opened from an old placement only the name and number is visible - all other data is hidden. All contact events will not show contact information and cannot be emailed.

In addition a separate Consent Process can be configured to allow a limited selection of users to change person records to certain consent states. These features require custom configuration so please get in touch with the support team for more information.

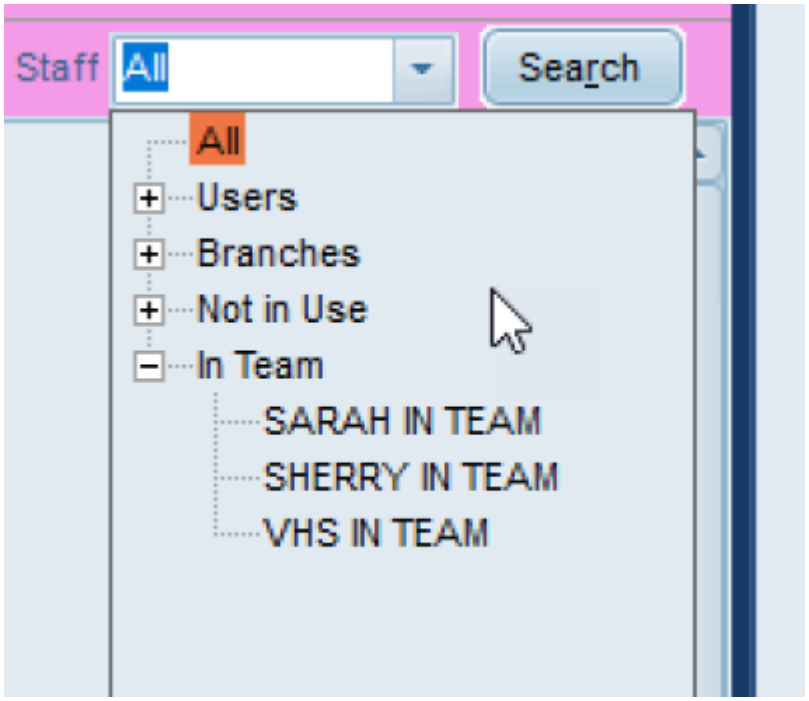
Hide option to include Unsubscribe to Marketing in Mail Merge

To assist consultants in adhering with GDPR and only sending mailers to those that have actively subscribed to receive mail merges from your agency. If set up by your System Administrator when carrying out a mail merge the selection will default to Subscribed and you will be unable to change this:



Vacancy Teams extended to Temp Vacancies

Vacancy Teams gives you the ability for vacancies to belong to a ‘Group’ not just a single consultant. This feature needs to be switched on for users by your system admin. If you have the rights to use Vacancy Teams, you will be able to select your In-team when searching for vacancies.



Shift Notifications sent to Secondary Agencies

If set up by your Agency it is now possible to send shift notifications to your Secondary Agency Contact to notify them of any shifts you have booked their candidates in to. The process is the same as sending notifications to your own clients and candidates but the system will pick up that this is a secondary agency candidate and pull up the notification to go to the secondary agency.

Switch to hide Do Not Transfer on Completed Timesheets

The 'Do not transfer' button on the time sheet view can now be hidden is necessary. See System Admin notes on how to edit this view.



Group Email setup for XML jobs

You can now set group emails to receive job information, rather than always going directly to a selected consultants. For example email addresses such as info@iqx.co.uk can now be added. This can be set up in Maintenance > Agency Set up > Email Group Notifications

Division controls re Cancel & Correct

The Advanced Timesheet Cancel & Correction option, which allows shifts and timesheets to be moved to other vacancies and even companies for re-invoicing within IQX, was restricted to just between companies that were ticked as the Invoice Address. It is now possible, per division, to set a specific state of company to be used where moving timesheets between companies is required. This is set in Agency Setup, Divisions in the TS Move State. The expected state to add is C for Client.

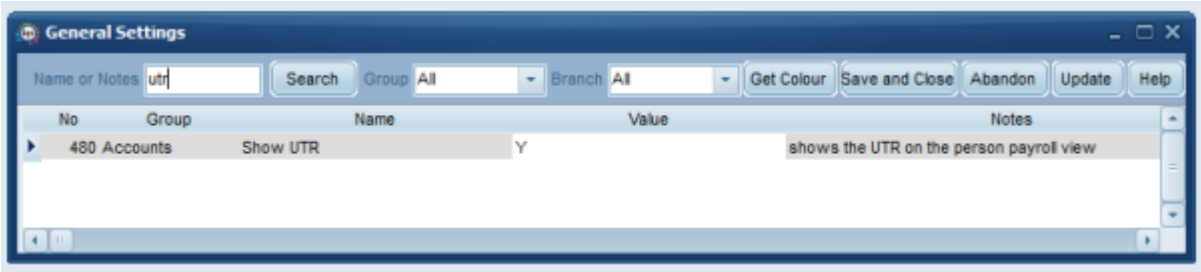
System Administrator

UTR number can be turned on in Payroll View

A candidates Unique Tax Number can now be viewed under the Payroll tab (this needs to be switched on by your system admin). Please Note: Although the UTR can now be viewed under the Payroll tab, it can only be edited if your Agency is not set to use CIS. If it is then the UTR can still only be edited

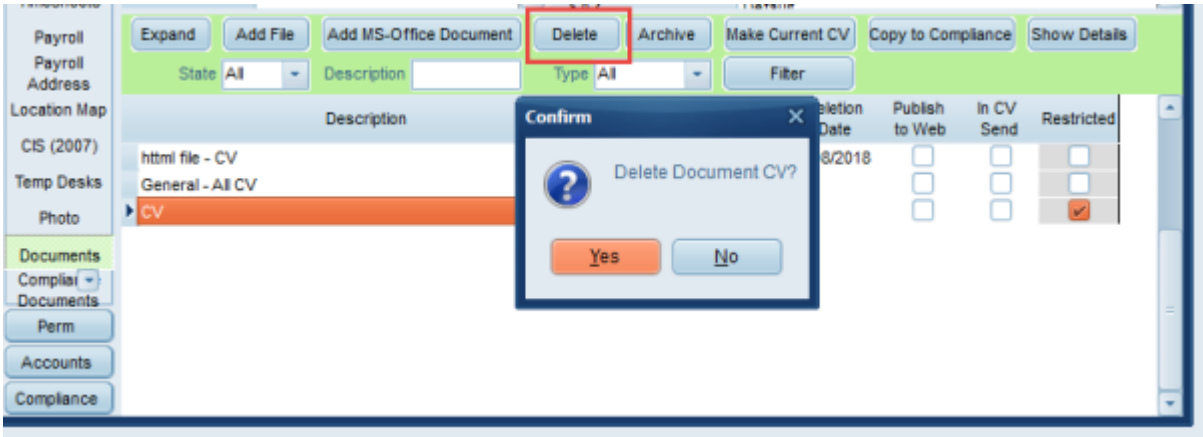
under the CIS view.

Turn this feature on in General Settings, set the group to Accounts and No. 480. Ensure value is set to 'Y'.

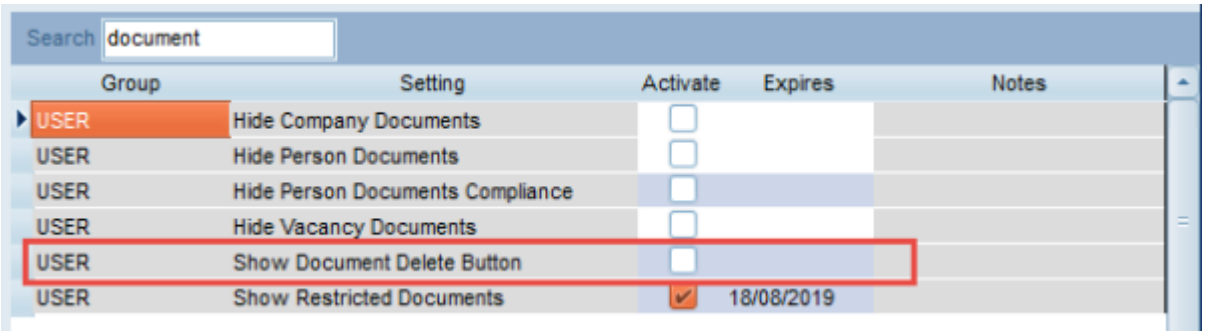


Role to be able to Delete Documents

It is now possible to assign the role to allow a user to delete documents from records including Person, compliance, company, vacancy, progress and placement documents. If this role is assigned (this can only be done by your system admin) then the delete button will appear as shown below. Once you have clicked the delete button, the pop up will appear to allow you to select yes or no. If you do not have this role assigned then the button will not be visible.



To able access to the delete document button navigate to Maintenance > users > user record > Layout settings > search ‘Show Document Delete Button’. Tick this button for the users you wish to have this access.

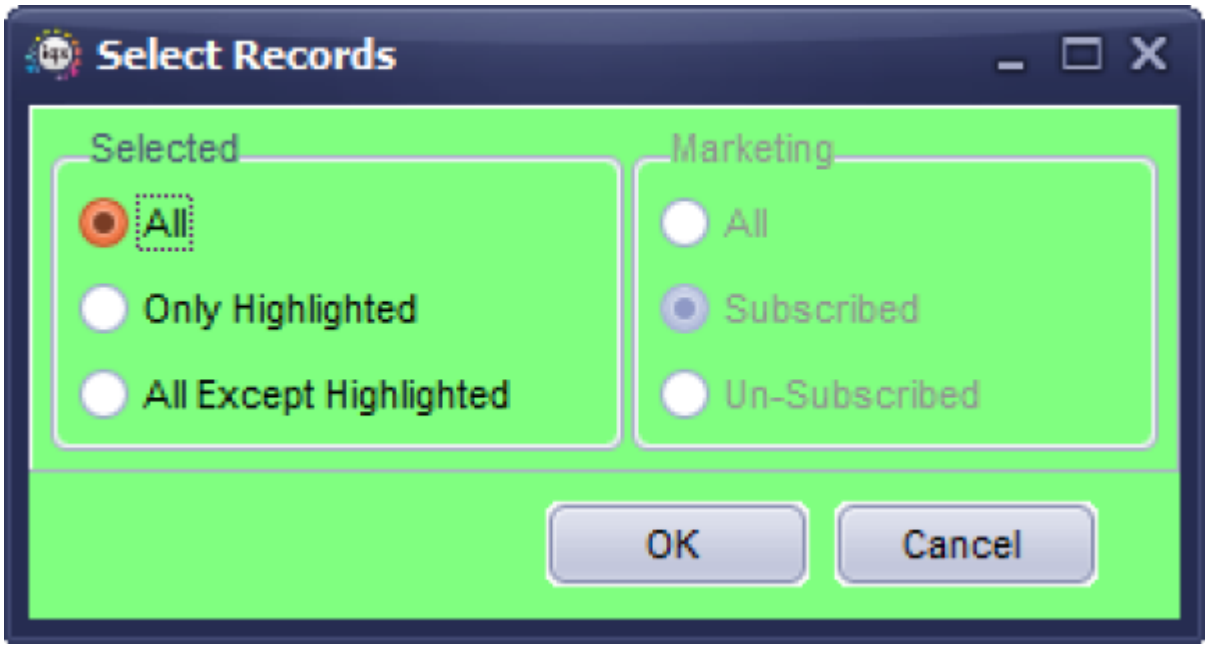


State Visibility and Consent Management

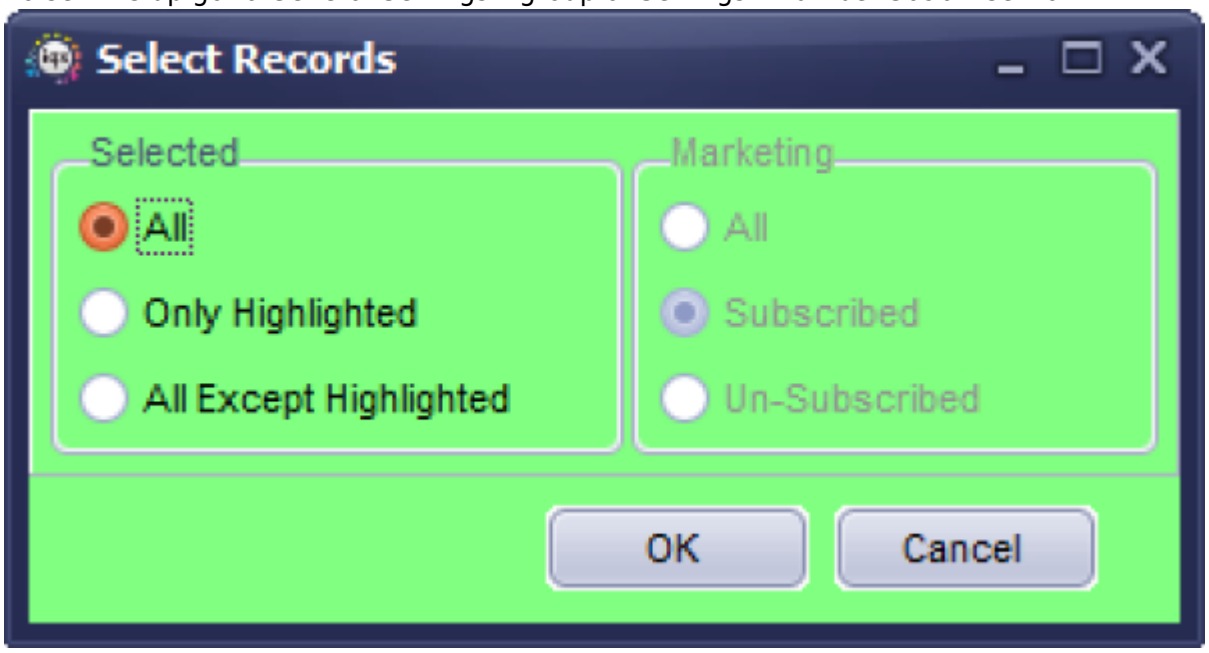
This functionality restricts access to old candidates who have worked for your Agency, therefore should not be deleted, but might have refused consent for future work, or the agency wishes to keep separate and un-contactable for GDPR reasons.
There is a new user role of Data Protection Manager - this must **ONLY** be given to a user who will be allowed to see the hidden data, for re-activation or other internal purpose. For smaller agencies it would be sensible for no-one to have this role except if data needs to be inspected, after which the role would be removed again. A Person state is selected or created for this section of data and for all users except Data Protection Manager that state will never be searchable in the person selector, or vacancy short list search. All contact events will not show contact information and cannot be emailed.

Hide option to include Unsubscribe to Marketing in Mail Merge

To assist consultants in adhering with GDPR and only sending mailers to those that have actively subscribed to receive mail merges from your agency. Once set up when carrying out a mail merges the selection will default to Subscribed and users will be unable to change this:

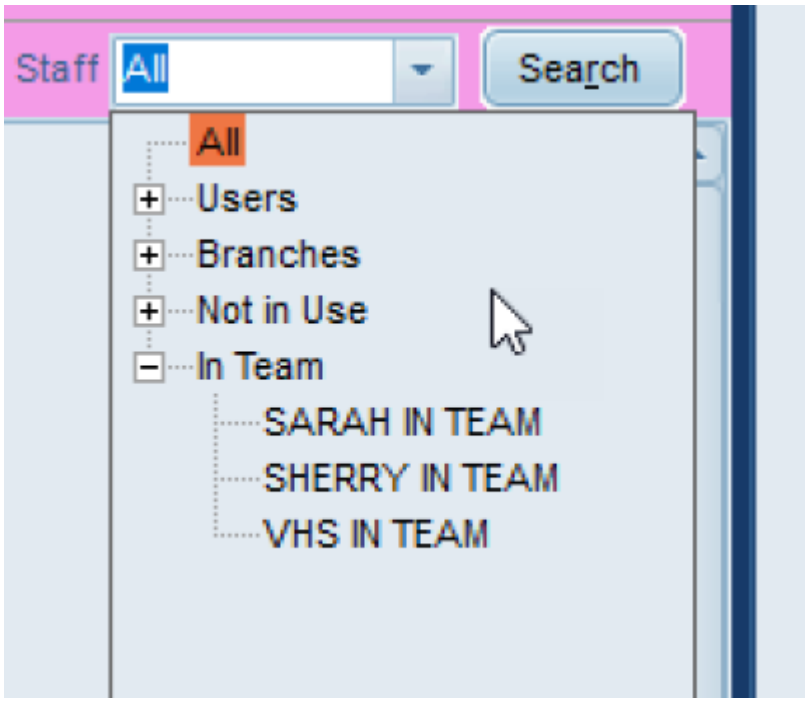


To set this up go to General Settings – group of Settings – number 3090 – set to Y.



Vacancy Teams extended to Temp Vacancies

Vacancy Teams gives you the ability for vacancies to belong to a ‘Group’ not just a single consultant. This feature needs to be switched on for users by your system admin. If you have the rights to use Vacancy Teams, you will be able to select your In-team when searching for vacancies.



To enable Vacancy Teams go to the users record > layout settings > Show Vacancy Teams and ensure this is ticked. There is also a setting in general settings which needs to be enabled: Allow Vacancy Team (1450). Additionally if Default Desktop Consultant to In-Team (2040) is Y the Desktop will open in the 'LoginName In Team' view rather than in their own 'LoginName' view.

Shift Notifications sent to Secondary Agencies

In Maintenance – Agency Set Up – Notifications you can now set up templates to send notifications to your Secondary Agency Contacts.

Use the Add button to add a new template, make sure the ID is unique and select Agency in the Recipient Type. Press the Help button to see a list of merge fields that can be used in the templates. The {SEG_} fields will only be available when the recipient type is Agency.

Switch to hide Do Not Transfer on Completed Timesheets

The ‘Do not transfer’ button on the timesheet view can now be hidden if necessary.



This switch is in General Settings - Temps - 1150 - Hide Do Not Transfer on Timesheet. With it set to Y Do Not Transfer is not visible on a completed timesheet With it set to N Do Not Transfer is visible on a completed timesheet Unable to set the value to blank Reverts to N.

Single Sign On

If your Agency has Active Directory authentication it is possible to log into IQX without having to complete the login box, provided the rights have been given to the user.

Group Email setup for XML jobs

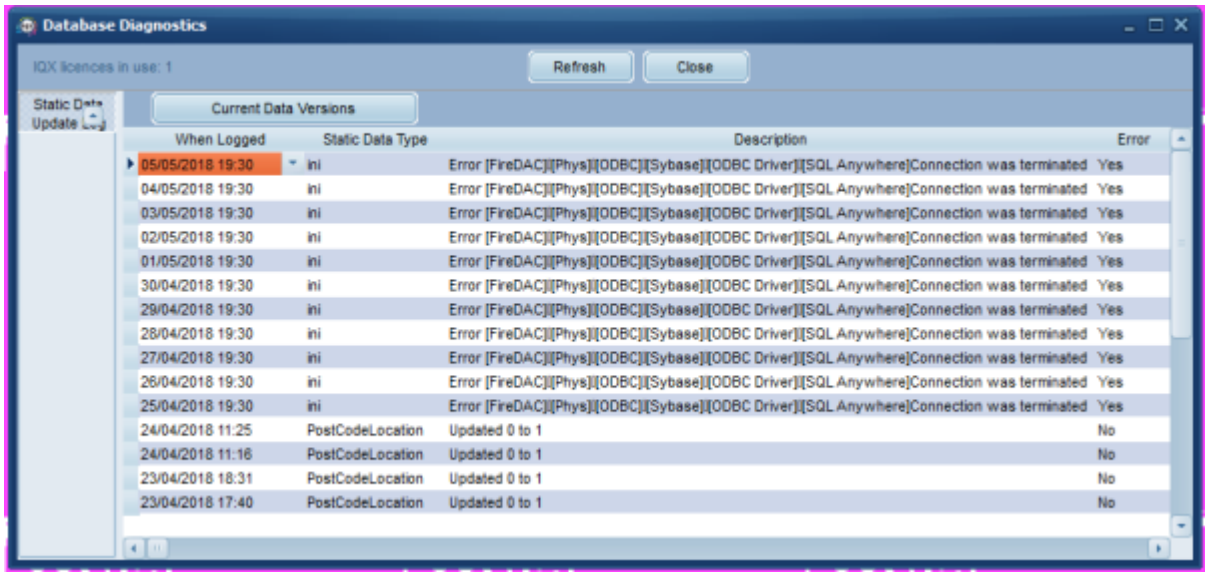
You can now set group emails to receive job information, rather than always going directly to selected consultants. For example email addresses such as info@iqx.co.uk can now be added. This can be set up in Maintenance > Agency Set up > Email Group Notifications. To modify jobs to use this please get in touch with the support team for more information.

Division controls re Cancel & Correct

The Advanced Timesheet Cancel & Correction option, which allows shifts and timesheets to be moved to other vacancies and even companies for re-invoicing within IQX, was restricted to just between companies that were ticked as the Invoice Address. It is now possible, per division, to set a specific state of company to be used where moving timesheets between companies is required. This is set in Agency Setup, Divisions in the TS Move State. The expected state to add is C for Client.

View Static Data Downloads

Personnel with full maintenance rights can now access a log of Static Data downloads to ensure that they are happening as expected and monitor any errors that occur. Access through Database diagnostics and go to tab labelled Static Data Update Log.



From:
https://iqxusers.co.uk/iqxhelp/ - **IQX**

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release_2.18.6

Last update: **2018/11/08 11:10**