



Release 2.21.04

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.

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FEATURES

Placement Extensions System

It was noted that Placements that get extended need to be identified as such as creating a whole new one manually is time consuming. As a result of this we created a new Placement Extension System. Users with the layout role to enable them to authorise Placement Extensions will see this new button on Placements.

The screenshot shows a software window titled "Temp Placement of Craig Adams as Scott Test 1 at A & M Stephens". The window has a menu bar with "Vacancy", "Reports", "Delete", "Withdraw", and "Help". Below the menu bar is a toolbar with various icons. The main area is divided into two panes. The left pane has a sidebar with "Details", "Split", "Contact Events", "Rates", "AWR Role", "AWR Linked", "Placements", "Shifts", "Timesheets", "Accounts", and "Staged Invoices". The right pane contains a form with the following fields:

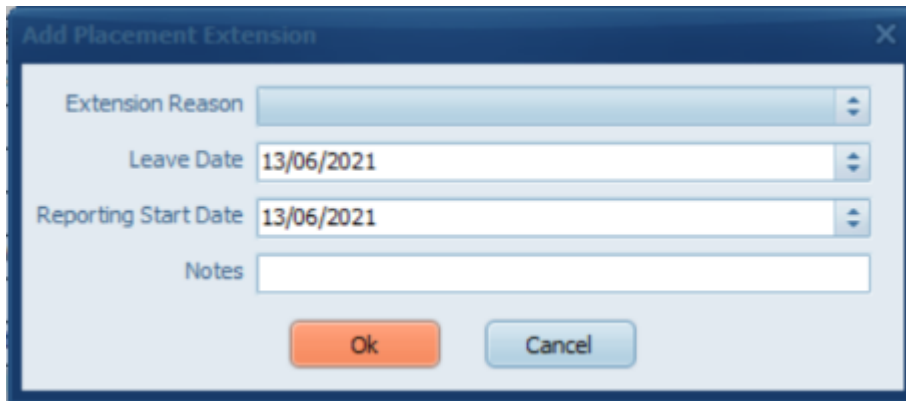
Applicant	Craig Adams
Company	A & M Stephens, A Stephens
Job Title	Scott Test 1
Client Department	
PO Number	
Contract	
Placement Date	09/04/2021
Override Invoice Layout	
Sales Brand	Alt1
Invoice Prefix	A1
Invoice Email	alt1@iqx.co.uk

On the right side of the form, there is a section for extension details:

Start Date	09/04/2021
Leave Date	13/06/2021
Department	Events
Consultant	SCOTTM
Our Ref.	3460
Concurrent or Shifts	☒
Override IR35	☐
Days per Week	5
Work Pattern	MTWTF__ 09:00 7.5 hours

The "Add Extension" button is located at the top of the extension details section and is highlighted with a red box.

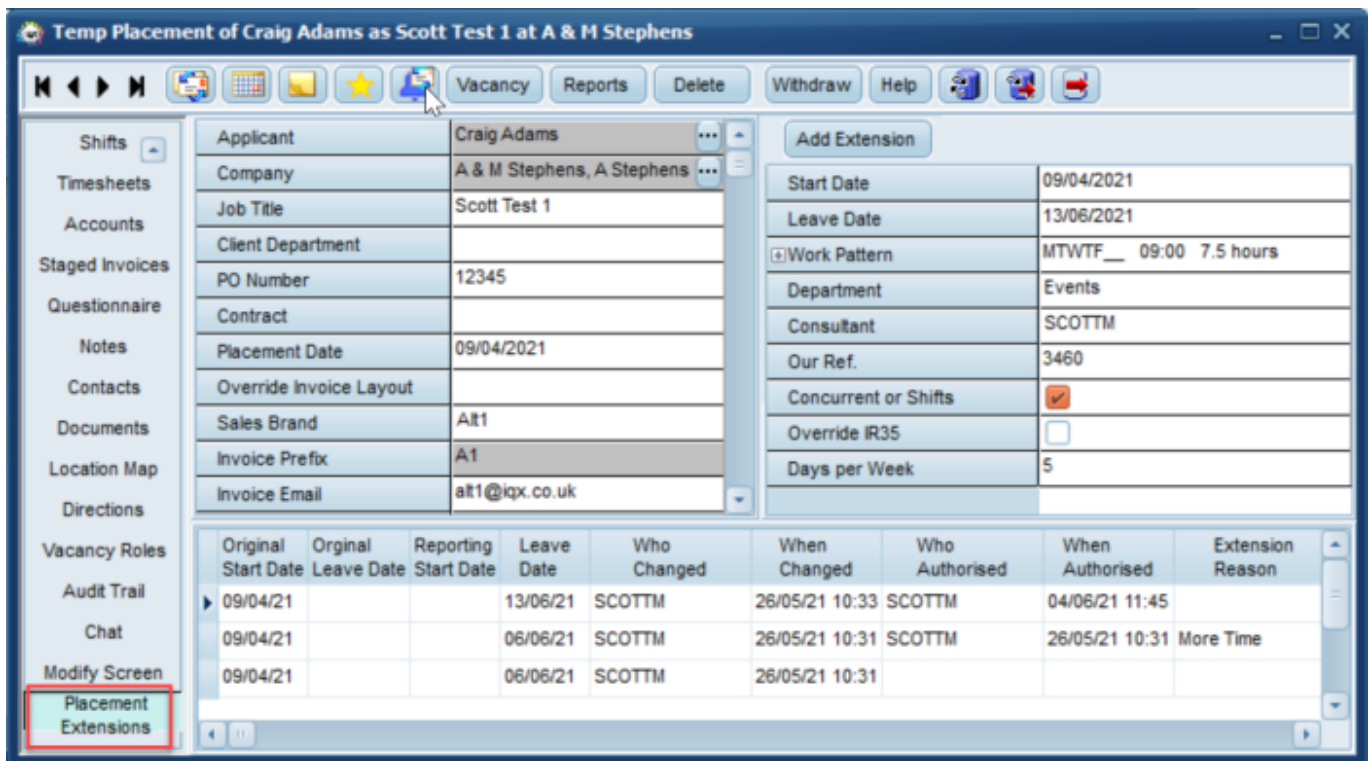
When this is pressed you are then prompted to select the reason for the extension, the new leave date and the reporting start date, you can also add any relevant notes at this point.



The 'Add Placement Extension' dialog box contains the following fields:

- Extension Reason: (Dropdown menu)
- Leave Date: 13/06/2021
- Reporting Start Date: 13/06/2021
- Notes: (Text area)
- Buttons: Ok, Cancel

All of the changes made are detailed in a placement extension table which can be viewed at the bottom of the Placement. This shows the original Start Date, original Leave Date, the updated Leave Date and also who changed it and when. This table is also updated if you manually change the Leave Date or create a Provisional Timesheet that is beyond the current Leave Date.



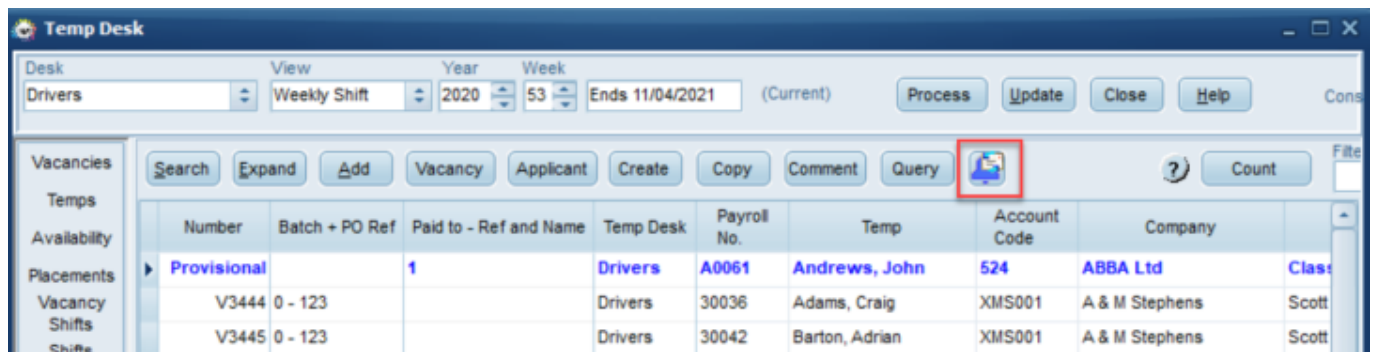
The main window displays the placement details for Craig Adams at A & M Stephens. The 'Add Extension' table is visible on the right, and the 'Placement Extensions' table is at the bottom.

Original Start Date	Original Leave Date	Reporting Start Date	Leave Date	Who Changed	When Changed	Who Authorised	When Authorised	Extension Reason
09/04/21			13/06/21	SCOTTM	26/05/21 10:33	SCOTTM	04/06/21 11:45	
09/04/21			06/06/21	SCOTTM	26/05/21 10:31	SCOTTM	26/05/21 10:31	More Time
09/04/21			06/06/21	SCOTTM	26/05/21 10:31			

This feature requires system administrator setup.

Notifications can be sent on Provisional Timesheets

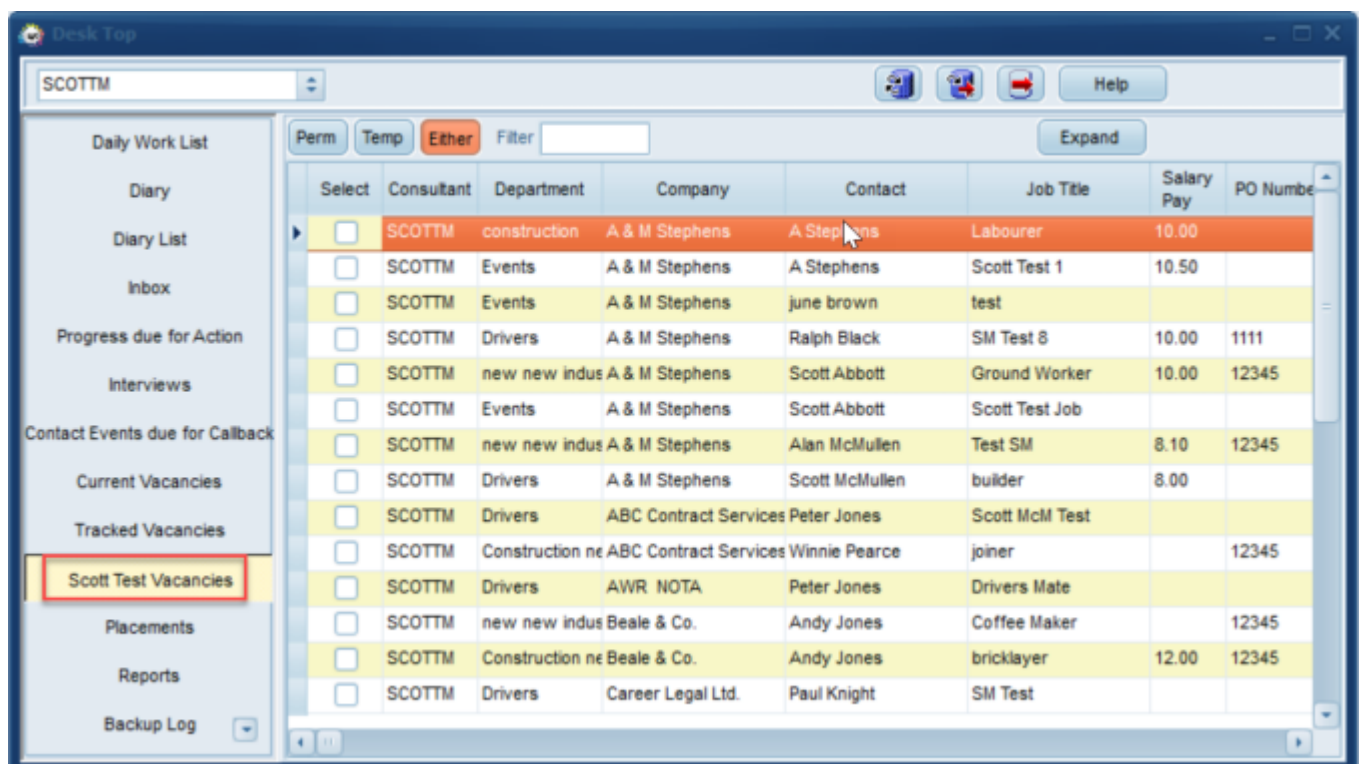
In addition to the other areas from which you can send notifications the ability to send notifications has now been added for Provisional Timesheets on the Temp Desk. You must press Ctrl + click with your mouse to select the timesheet before pressing the notification icon. Notifications can be sent to the Candidate, client or both.



This feature requires system administrator setup.

Ability to add a new Vacancy View on DeskTop

As well as Current Vacancies and Tracked Vacancies it is possible to add a new Vacancy view within the Desktop. This is capable of displaying multiple vacancy states and useful if you want or need to monitor or action vacancies that are across multiple states.



This feature requires System Administrator setup.

Departmental Questions can be added to Contact Event Questionnaire

As well as being able to add global questions into a contact event questionnaire, users with the required settings are also able to add / view departmental questions in the contact event



questionnaire.

Contact Event Alexandra Poppy Abbott

Text
Letter Text
Questionnaire
Email Log

Person: Alexandra Poppy Abbott

Made By: SCOTTM

Date: 08/06/2021

Time: 13:54

Type: Other

Summary:

Outcome:

Callback:

Callback Time:

Home Phone: 01632 299 284

Day Phone: 01

Mobile: 12121

E-mail: Alexandra_Abbott@iqxdemo.co.uk

LinkedIn: Alexandra_Abbott@iqxdemo.co.uk

Skype: Alexandra_Abbott@iqxdemo.co.uk

Twitter: Alexandra_Abbott@iqxdemo.co.uk

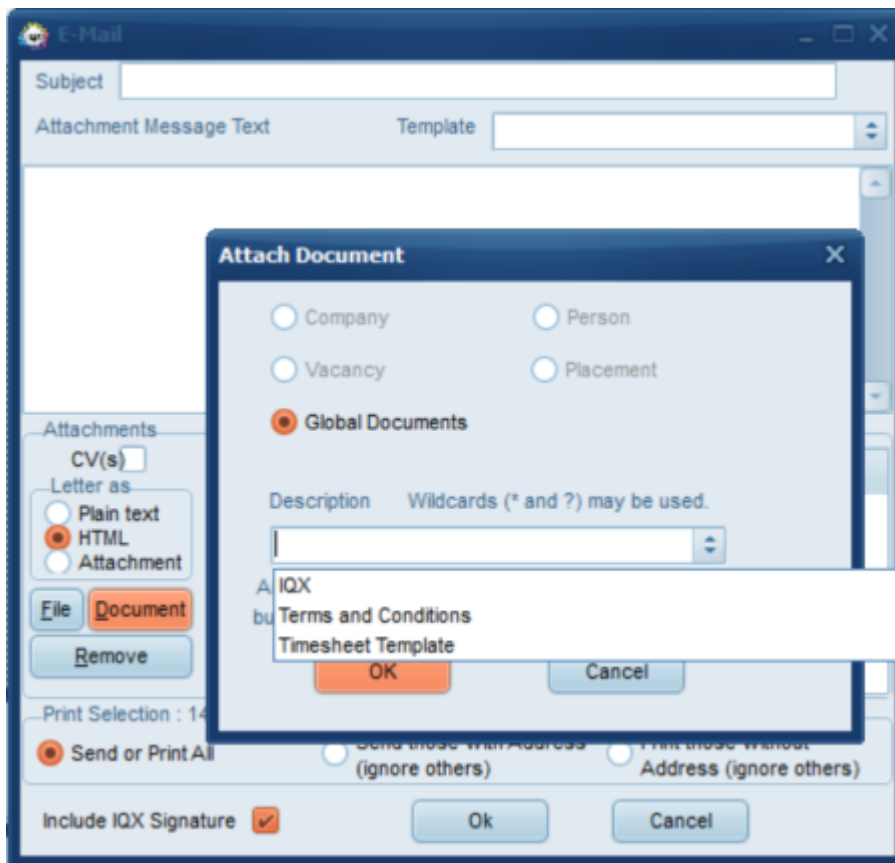
Scott Test

Contact Made

This feature requires system administrator setup.

Added drop down list of Global Documents when sending a mail merge

Drop down list similar to that when sending a Contact Event has been adding when selecting a Global Document to be sent within a mail merge.



Agency Questions can be included in Email Signature

Answers to Agency questions can now be included in an email signature. Please contact IQX Support if you wish to add this to your email signature.

ENHANCEMENTS

Collections / Internal Chat improvements

There have been several tweaks and improvements made to the Collections / Internal Chat feature. These are listed below.

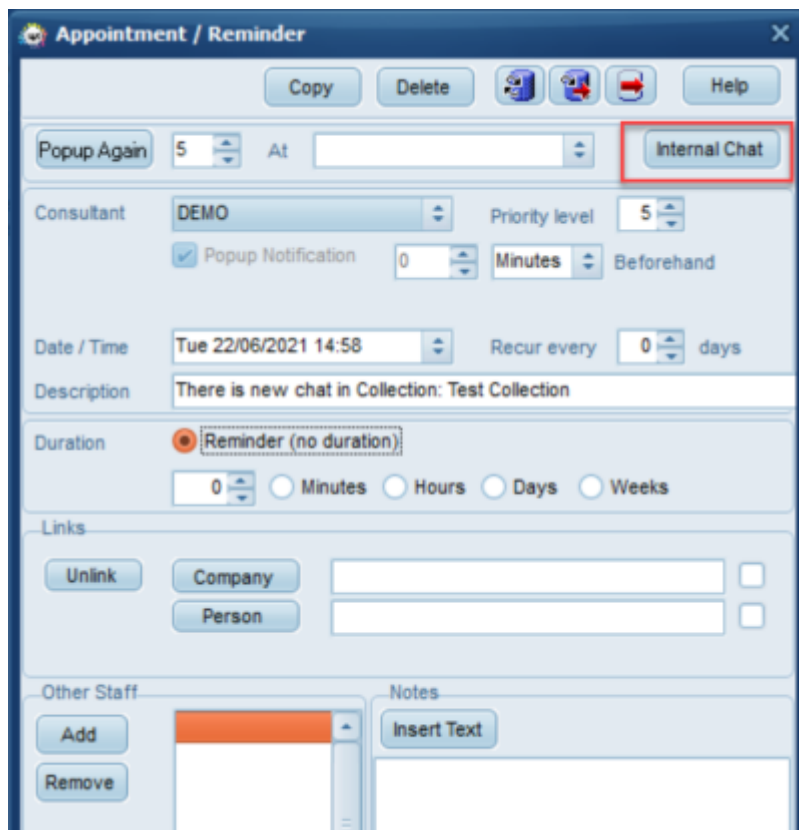
1. A new User Layout Setting for collections has been added. Only Users with this Layout Setting enabled will be able to view and use the Collections / Internal Chat Feature.

This feature requires system administrator setup.

2. List of Users which excludes those who have not got the rights to see Collections / Internal Chat. The Collections / Internal Chat view only shows if the user has the layout setting activated that

enables them to see this. In addition when adding new users you are only able to add users that have this enabled.

3. New button added on Diary Pop Up that takes you to DeskTop, Collections / Internal Chat. When a user gets a pop up reminder to advise they have been added to an Internal Chat / Collection or that there is a new chat message there is now a button within the pop up that takes you to the Internal Chat / Collections view on the Desktop.



4. Latest chat always shows at top and column showing number of unread chats. For users that have access to the Internal Chat / Collections view a new column has been added to show how many unread messages there are. This is in addition to the latest chat always showing at the top.



Desk Top

SCOTTM

Expand New Archive Status Active Filter Delete Help

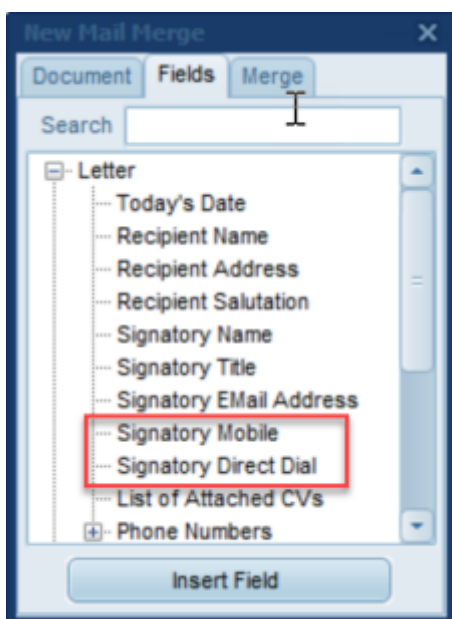
Name	Internal Chat Type	Unread	Latest Chat	Who Created	Date From	Date To	When Created
Test Collection	Leads	2	22/06/21 15:25	SCOTTM	01/03/2021	25/04/2021	30/03/21 11:24
Test 8 67676	Invoice	0	26/05/21 13:44	SCOTTM			31/03/21 11:43
Test1		0	31/03/21 08:43	SCOTTM	31/03/2021		31/03/21 08:41
Invoices for Review	Invoice	0	30/03/21 14:09	SCOTTM	01/02/2021	30/05/2021	30/03/21 14:02
Scott Test 7	Invoice	0		SCOTTM			19/05/21 09:21
Test 1		0		SCOTTM			31/03/21 09:56
test 5		0		SCOTTM			31/03/21 09:58
Scott Test	Recommendations	0		SCOTTM			31/03/21 11:52
Scott User Test	Leads	0		SCOTTM			04/05/21 13:04
Problems	Problems	0		SCOTTM	01/01/2021	31/12/2021	30/03/21 14:03

5. Easier to expand and styling and sizing improvements Users with access to Internal Chat / Collections are now able to double click on the name to open it rather than having to click on the Expand button. Styling and sizing improvements have also been made particularly within the questionnaire section.

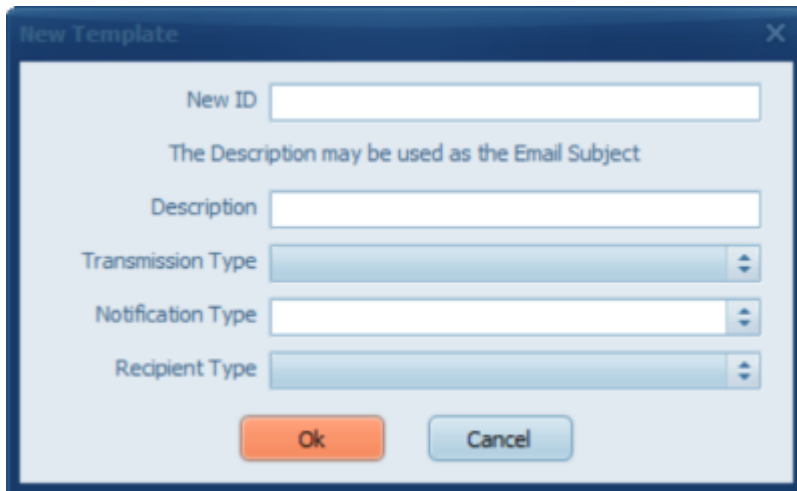
Notifications Improvements

There have been a few tweaks and improvements made to Notifications, these are listed below.

1. Can include Consultants' Direct Lines and Mobiles as merge fields. New fields for Mobile and Direct dial have been added to User / Consultant records. These can be used as merge fields in emails or texts without the need to configure user questionnaires.



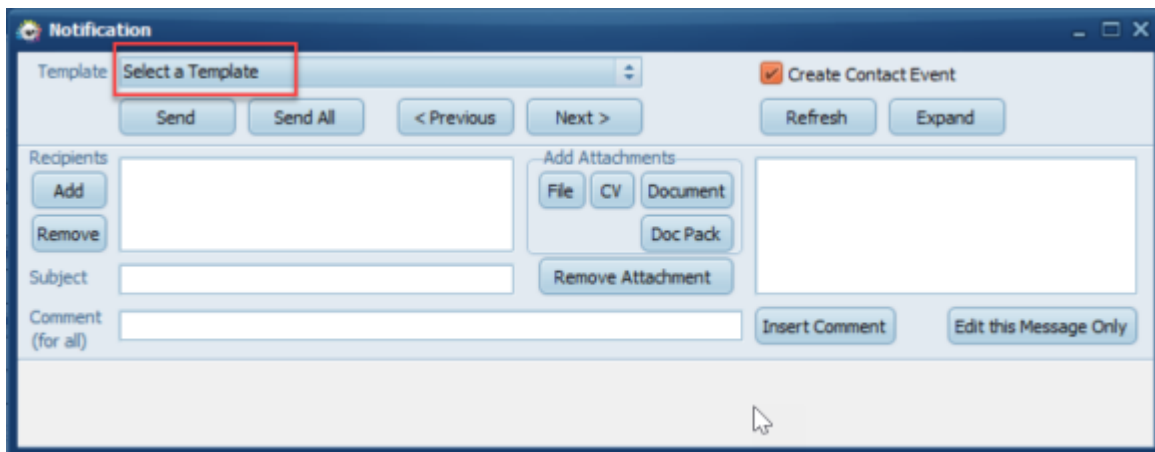
2. The column heading Description is also the default Email Subject, this is now clearer when adding a new Notification.



New Template dialog box with the following fields:

- New ID:
- The Description may be used as the Email Subject
- Description:
- Transmission Type:
- Notification Type:
- Recipient Type:
- Buttons: Ok, Cancel

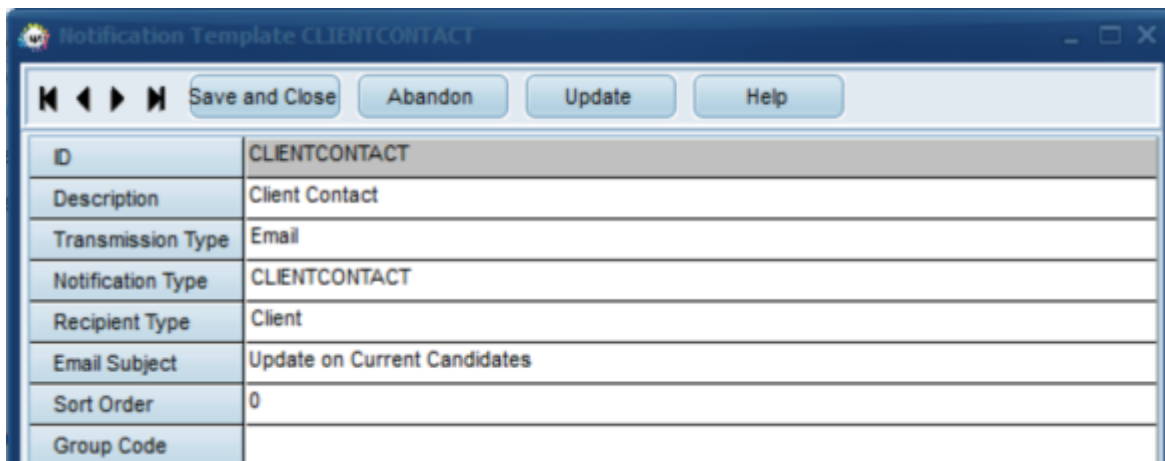
If more than one Notification template is available instead of prefilling with the first one there is text that advises to 'Select a Template' so users are aware there are options.



Notification window with the following elements:

- Template:
- Buttons: Send, Send All, < Previous, Next >, Refresh, Expand
- Recipients: Add, Remove,
- Add Attachments: File, CV, Document, Doc Pack, Remove Attachment
- Subject:
- Comment (for all):
- Buttons: Insert Comment, Edit this Message Only
- Checkbox: ☒ Create Contact Event

3. Although the description is the default field for Email Subject, a new one can be added. A new field for Email Subject has been added to notifications. Although the description is used as the email subject you can now add a separate more meaningful subject for the email. If an email subject exists this will override what is in the description when it comes to sending the email.



Notification Template CLIENTCONTACT window showing a table with the following data:

ID	CLIENTCONTACT
Description	Client Contact
Transmission Type	Email
Notification Type	CLIENTCONTACT
Recipient Type	Client
Email Subject	Update on Current Candidates
Sort Order	0
Group Code	

Buttons: Save and Close, Abandon, Update, Help



The screenshot shows the 'Client Contact' form. The 'Subject' field contains the text 'Update on Current Candidates', which is highlighted by a red arrow. The form includes fields for 'Recipients', 'Add Attachments' (File, CV, Document), 'Remove Attachment', 'Comment (for all)', 'Insert Comment', and 'Edit this Message Only'. There are also buttons for 'Send', 'Refresh', and 'Expand'.

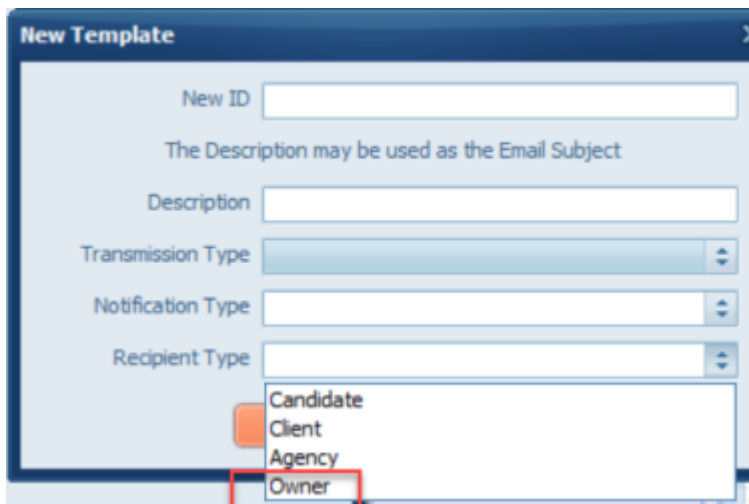
4. Merge fields can be added to the Email subject. Improvements have been made and you are now able to add merge fields to the email subject on a Notification. This could be useful if for example you are sending Notifications to a short list of candidates and you want to personalise each email subject line.

The screenshot shows the 'Notification Template SM_TEST_1' form. The 'Email Subject' field is highlighted with a red box and contains the text 'Interview Request {App_Name}'. The form includes fields for 'ID', 'Description', 'Transmission Type', 'Notification Type', 'Recipient Type', 'Sort Order', 'Group Code', 'Division', and 'Defunct'. There are buttons for 'Save and Close', 'Abandon', 'Update', 'Help', 'Insert Text', 'Insert Field', 'Insert Question', 'Search', 'Find', and 'Preview Template'.

The screenshot shows the 'This is my test notification' form. The 'Subject' field is highlighted with a red box and contains the text 'Interview Request - Alexandra Poppy Abbott'. The form includes fields for 'Recipients', 'Add Attachments' (File, CV, Document), 'Remove Attachment', 'Comment (for all)', 'Insert Comment', and 'Edit this Message Only'. There are also buttons for 'Send', 'Refresh', and 'Expand'.

Please note there is a 100 character limit on the Email Subject Field.

5. New recipient type 'Owner' has been added. Notifications now has a recipient type of owner to simplify if you want to send documents internally.



New Template

New ID

The Description may be used as the Email Subject

Description

Transmission Type

Notification Type

Recipient Type

Candidate
Client
Agency
Owner

Extra warnings when deleting employment records

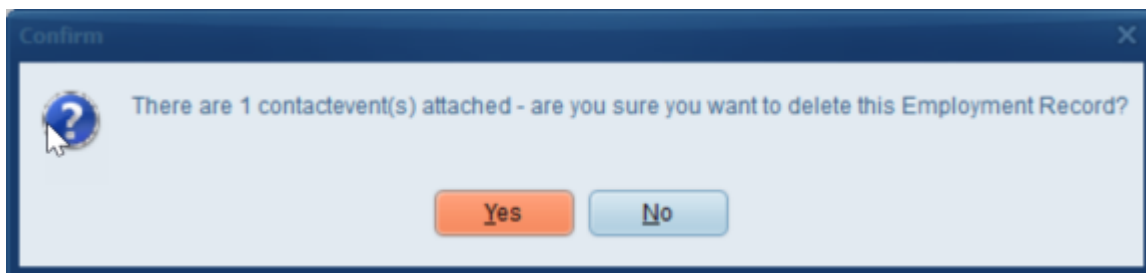
As an extra precaution an additional warning has been added if you are deleting an employment record from a person's history that has contact events attached to it.



Confirm

Delete this Employment Record (Internal). ?

Yes No



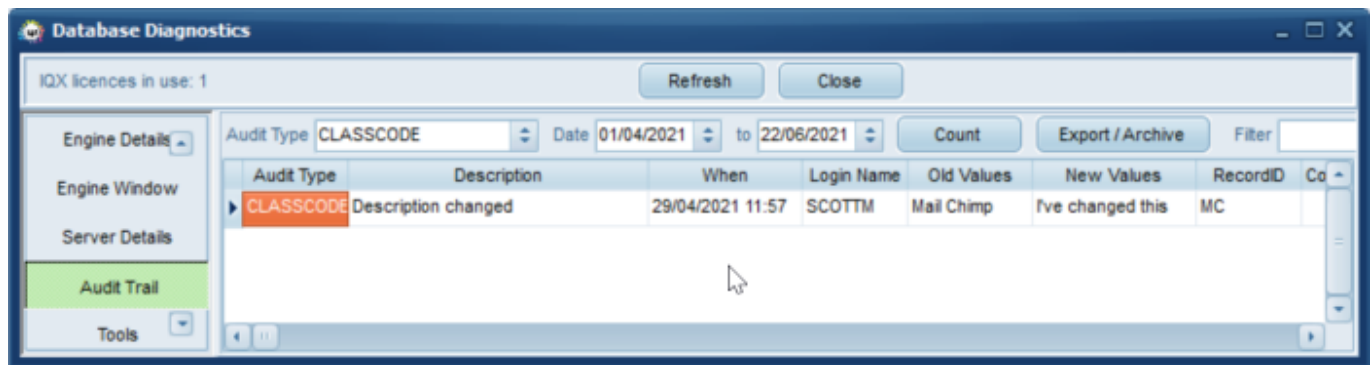
Confirm

There are 1 contactevent(s) attached - are you sure you want to delete this Employment Record?

Yes No

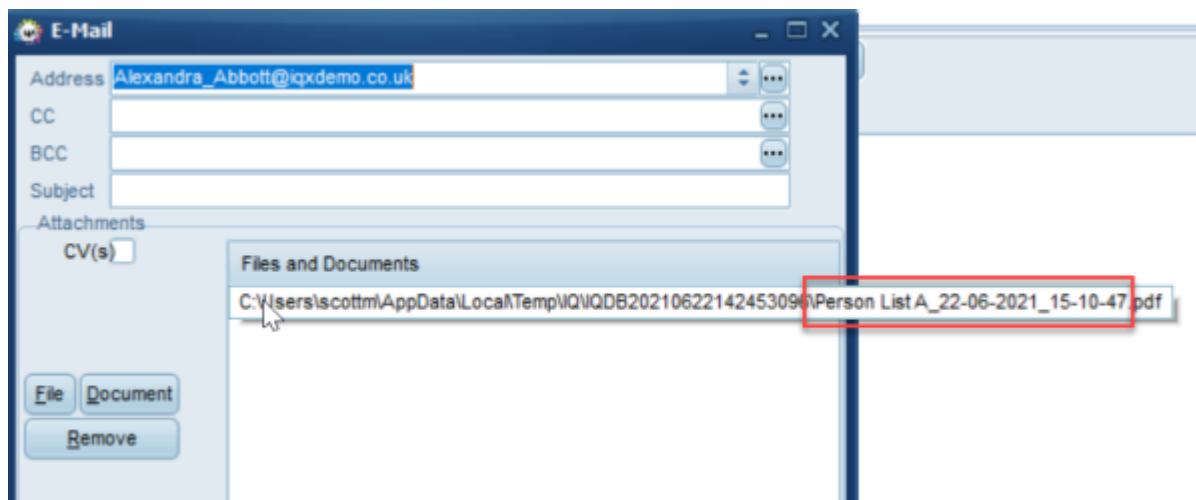
Changes to Contact Event Description are Audited

Any changes made to the description of a Contact Event type are now audited. These can be viewed in Maintenance, Database Diagnostics, Audit Trail under the Audit Type - CLASSCODE. This details the old description values as well as the new ones.



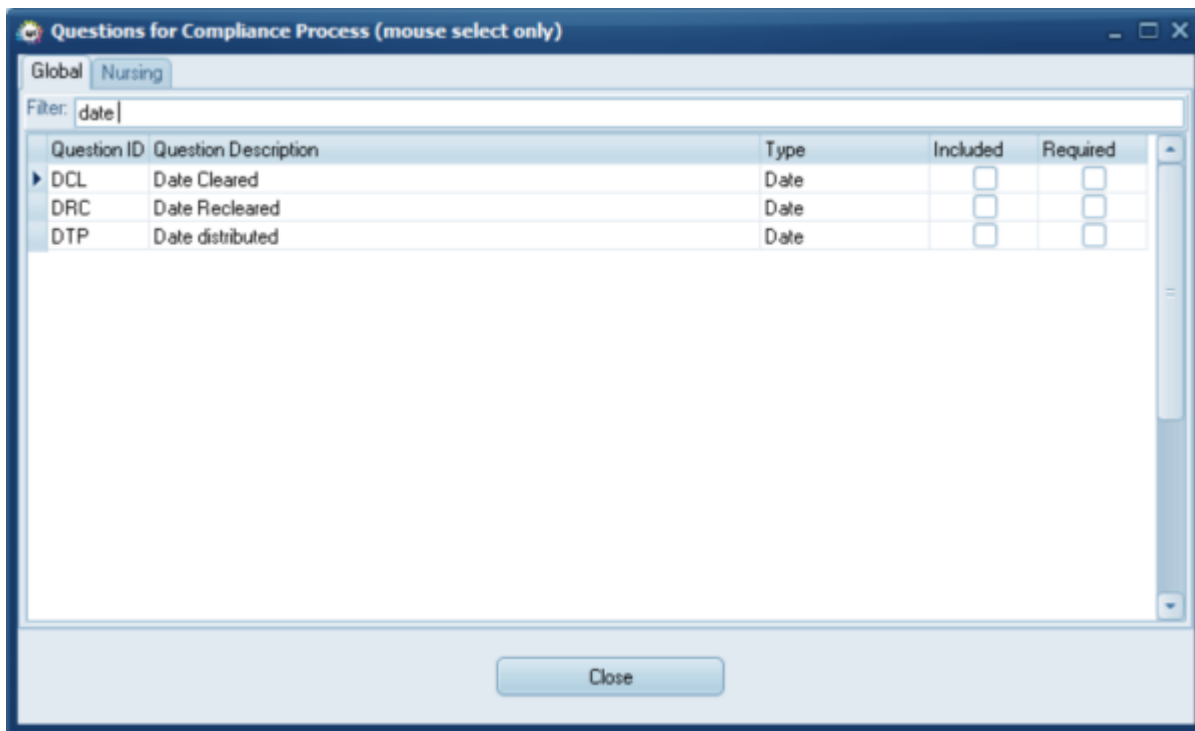
Improved naming when dragging a report into a Contact Event

When dragging a report into a Contact Event and then clicking on Send Email. When you hover over the attachment it now shows the report name, previously it would only show the ID.



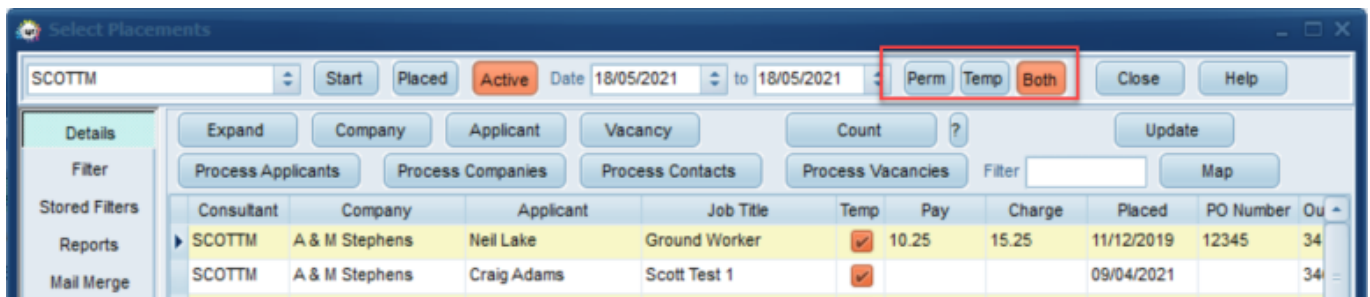
Filter Added to Compliance Documents Questions View

A filter has been added to the Compliance Documents Questions view. In Maintenance, Agency Setup, Document Types (ensure that it is Compliance) and then when clicking on Questions you are now able to filter to quickly find questions.



Placement Selector Default of Perm, Temp or Both

When on the Placement Selector the Default behaviour as to whether it should show Perm, Temp or Both is now based on the Users role.



If just Temp Role then the Temp Button is selected
 If just Perm Role then the Perm Button is selected
 If both roles then the Both button is selected.

Amendments to Margin checking

Changes have been made so that margin checking is now done on charge less cost instead of charge less pay.

Ability to easily add specific rates to specific days using Rate Scripts

It is possible to assign a specific rate to a specific day using a Rate Script. For example you can say



that if a shift falls on the last day of the month apply 'X' rate. Useful for Days like Christmas Day or New Years day or any other specific date where you would pay a different / Enhanced rate.

Please contact IQX Support if you would like to add this.

Temp Desk Availability - next availability

When on the Temp Desk Availability view if you click on the date heading at the top of the grid this will only show you people that are available on that specific day. This allows you to easily see who is available on a specific date from one place.

Fixes

- When Filling shifts IR35 pop up only comes up on first booking rather than all.
- Searching in General Settings for the word 'Consultant' this now returns Layout Setting 110 'Show Consultant against Companies'.
- SQL error on Person Progress Send Doc has been fixed.
- Issue with Contact Event Selector not listing other staff who have access to the same divisions fixed.
- Rounding error with Margin Rate checking has been resolved.

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