Release 2.21.11

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.

- Features
- Enhancements
- System Administrator
- Fixes

FEATURES

Bulk CV Import for both IQX and IQXanywhere

The ability to perform a Bulk CV Import has been added to the person selector on both IQX and IQXanywhere. If not on IQXanywhere you have the option to upload CV's from either a zip file or a folder.

For IQXanywhere you can only upload CV's from a Zip file, which is then copied to a temp folder and unzipped. When bulk uploading using a Zip file, a CSV is created with the filename and outcome (Finished, Rejected or Duplicate), which can then be downloaded.

This feature requires System Administrator setup.

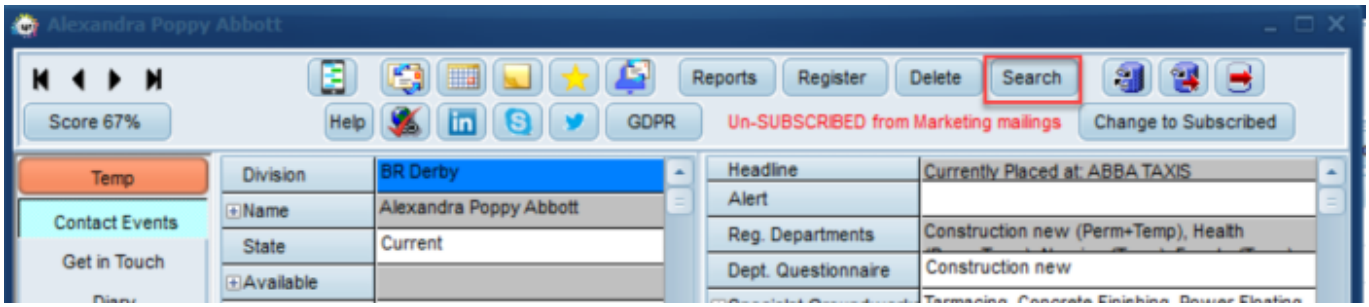
Send CV's without invoking the Word Processor

A new General Setting has been added that when enabled will allow CV's to be sent from a Vacancy shortlist without having it reformatted by being opened in the Word Processor (MS Word or AXWWriter) as part of the process. If set to Yes, the 'Send without updating' option on the Send CV dialog will be ticked, meaning that CVs will be sent without any embedded merge fields being updated by the word processor. This can be useful if merge fields are not used and you wish to avoid any reformatting.

This feature requires System Administrator setup.

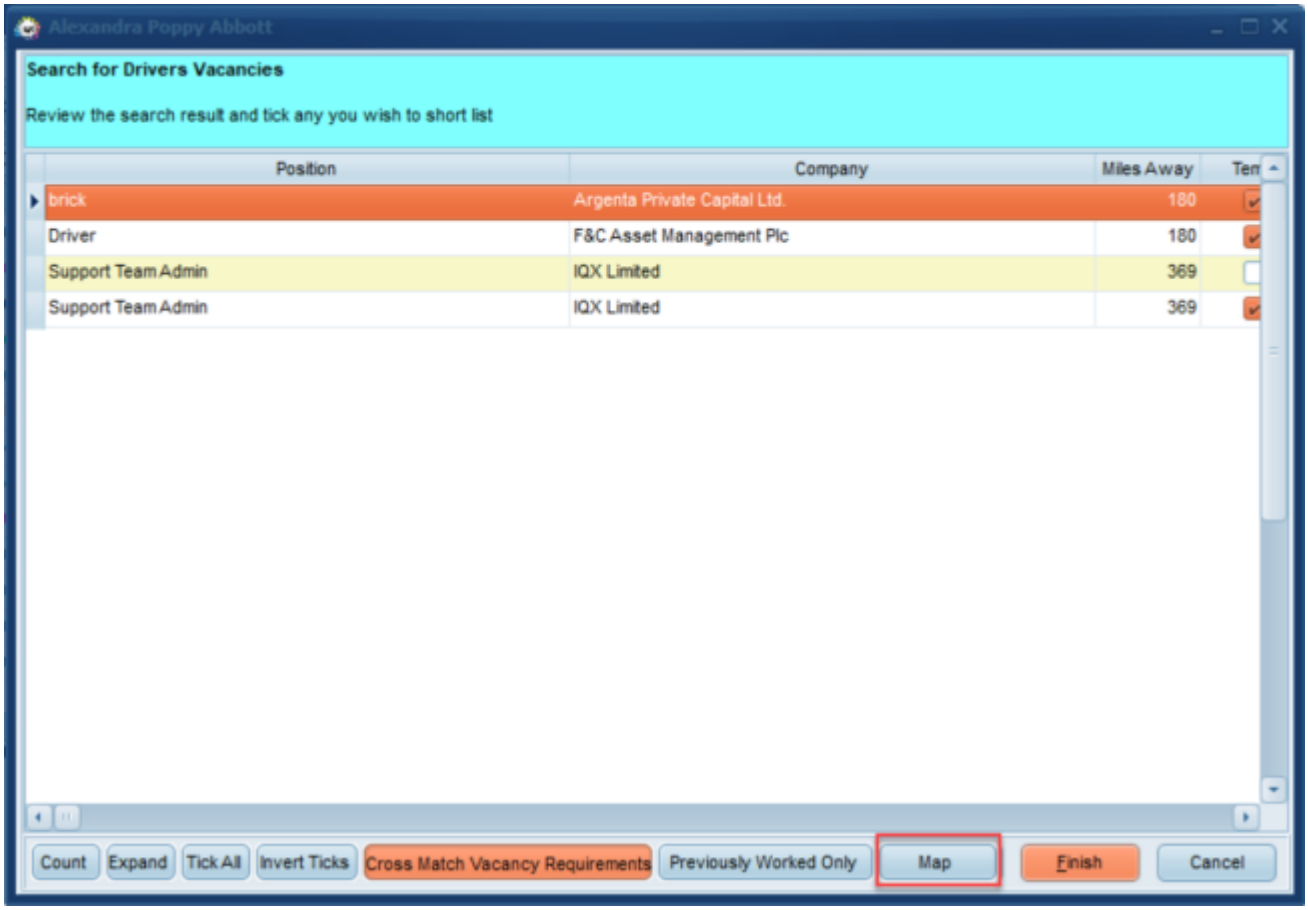
Searching for Vacancies from Person - Desk Type mirrors Users Default Temp Desk

When searching for vacancies from a Person record using the search button shown below the Desk type on the first screen mirrors the type of desk the consultants default Temp Desk is. It is also possible to change the dropdown selection.

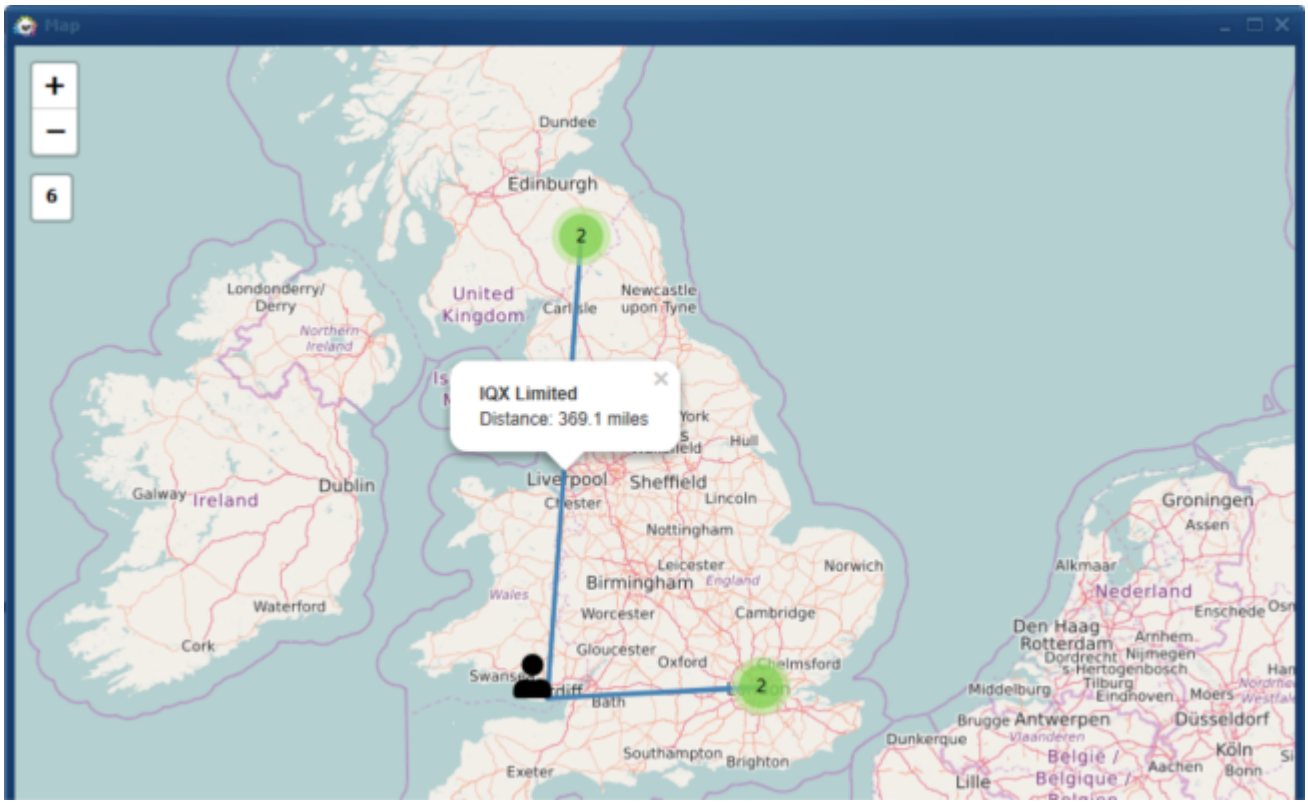


Searching for Vacancies from Person - Option to view results on a Map

When searching for vacancies from a Person record using the search button, a new Map button has been added that enables you to see where all the Vacancies are in relation to the person.



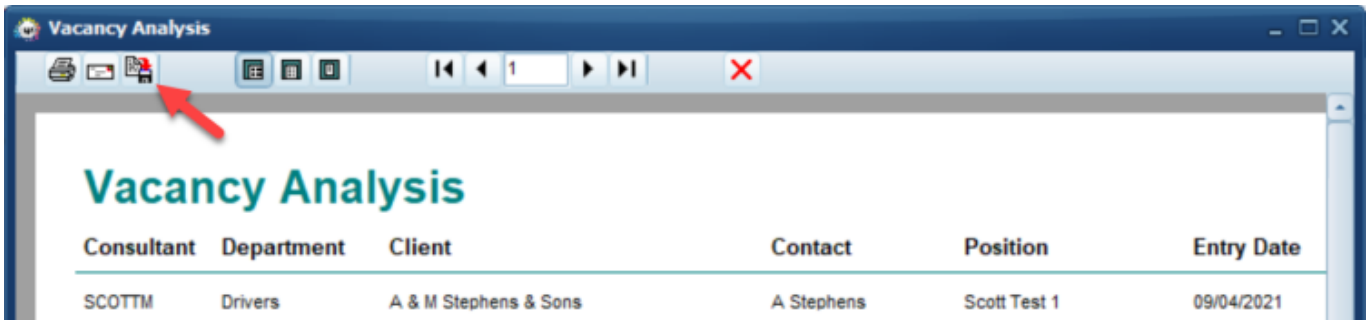
Once clicked you will see results for all Vacancies and the distance they are from the Person.



Save a report as a PDF to either Documents or Compliance Documents views

If enabled by your agency you can save a report as a PDF to the Documents view and also Compliance Documents view on a Person record if you have Compliance rights. You can also add to the Documents view on Company, Placement, Progress and Vacancy. Please note this can only be done if the report is generated from an individual record, it will not work on the selector screens.

For reports that have had this feature added there is a new button that will show in the report that allows the saving of the report as a PDF.

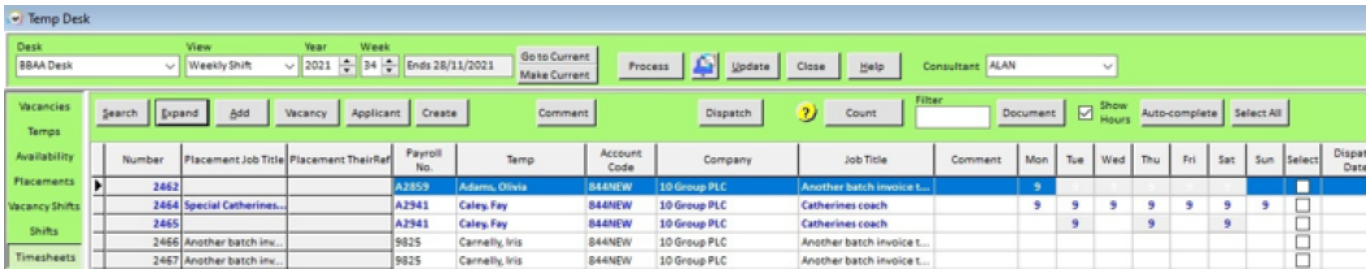


This feature requires System Administrator Setup.

Provisional Timesheets linked to Special Placements

It was reported that it was sometimes difficult to understand why some shifts appear on all Provisional Timesheet lines and some on just one, it is because there is a Special Placement link.

To make this easier we have now amended the background colour, if linked to a Special Placement there will be no background colour, if not linked to a Special Placement the background colour will be grey.



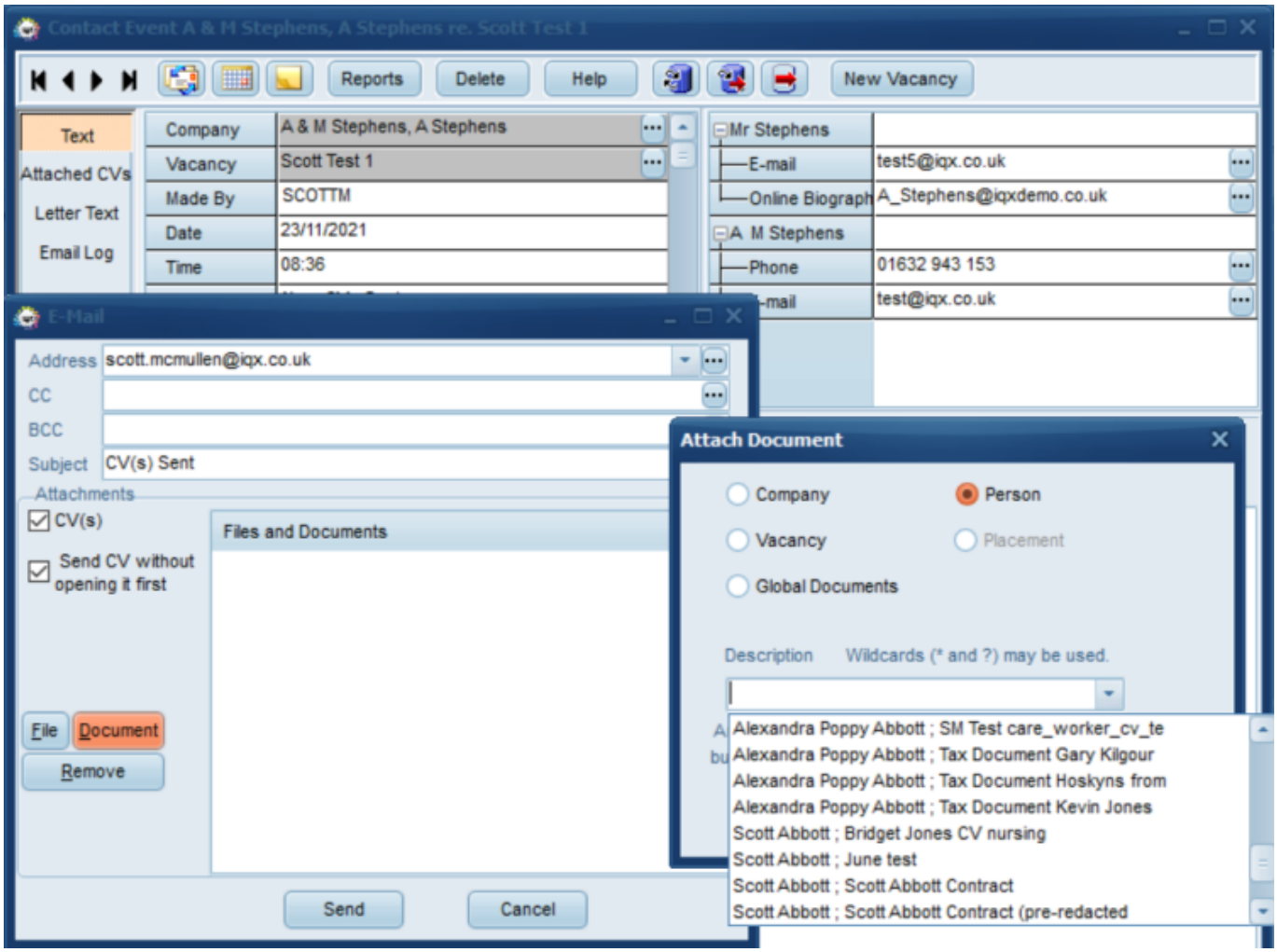
Set Client Contacts as Timesheet Authorisers

You can now set Timesheet Authorisers within IQX. Once these have been set it means when a candidate completes their timesheet on iqxWEB and clicks to send for approval rather than having to free type in an email address for who it should be sent to for authorisation they can now select from a dropdown box.

This feature requires System Administrator setup.

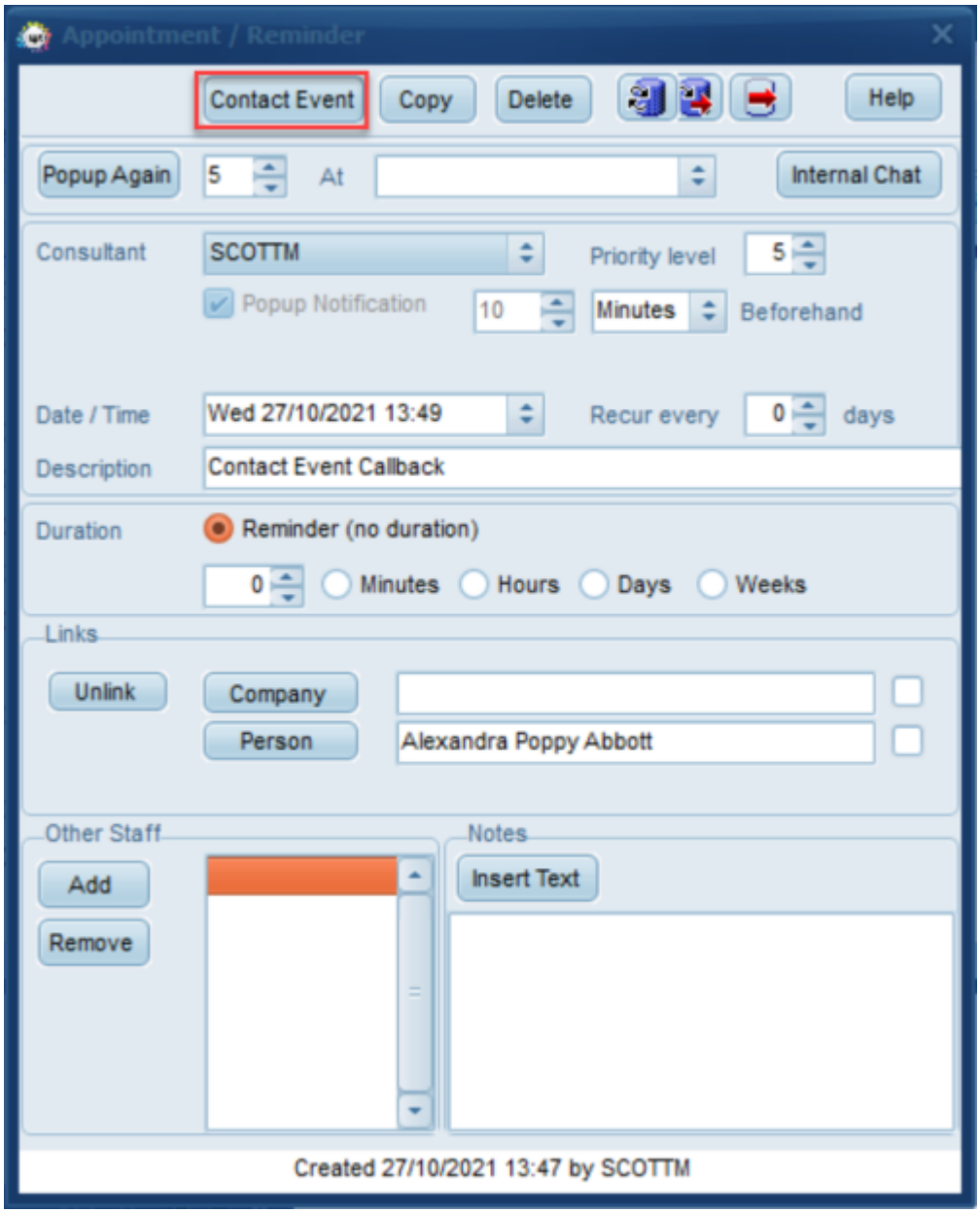
Contact Events with linked Candidates

Where you have multiple Person records linked to a Contact Event (sending Cv's from a vacancy shortlist as an example) when sending an email from the Contact Event and adding Person Documents you will see a list of all their documents, prefixed with their name before a semi colon.

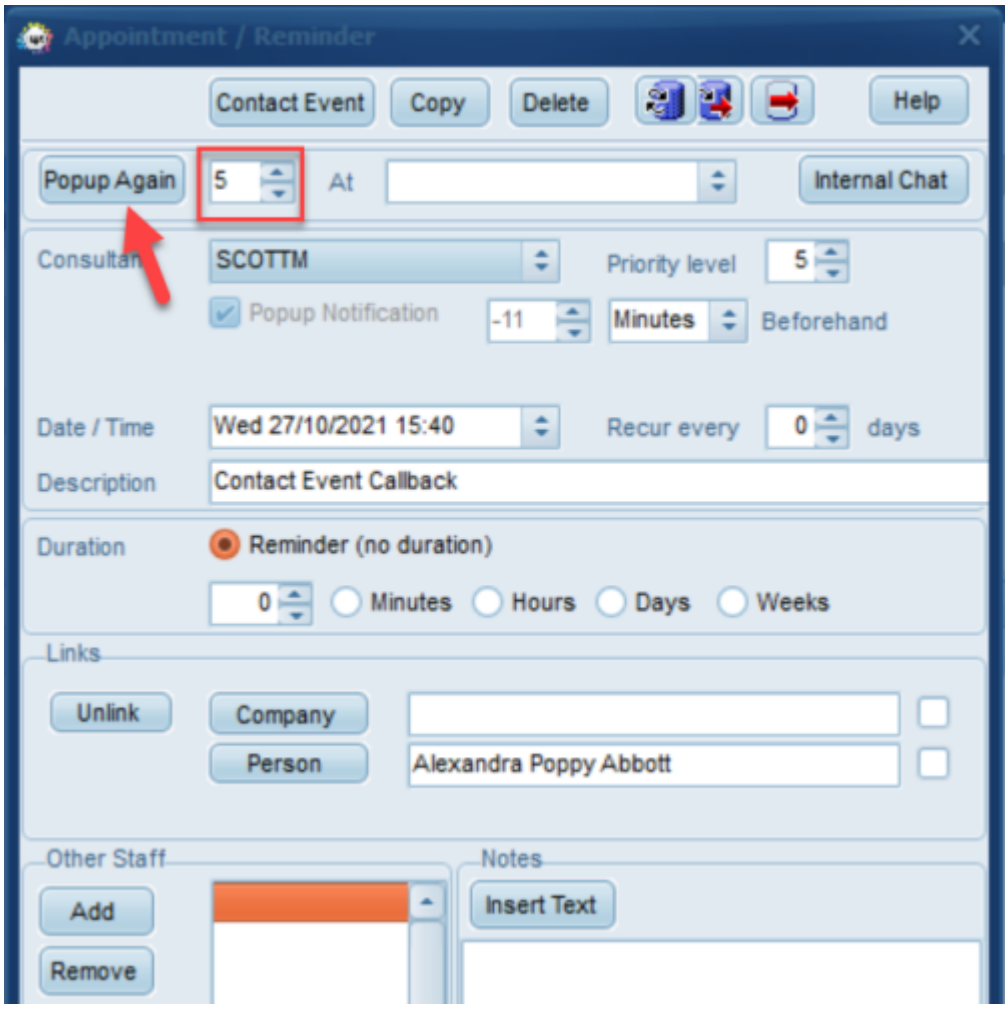


Contact Event Call Backs - Linked Pop Up Reminder

You can now have pop up reminders for Contact Event Call Backs that you have set. From the pop up you can click on the Contact Event button to see the original contact event.



Please note that you can set the pop up to display again in a set number of minutes if you are not quite ready to deal with it there and then. You would just need to set the number of minutes and then click on Popup Again as shown below.



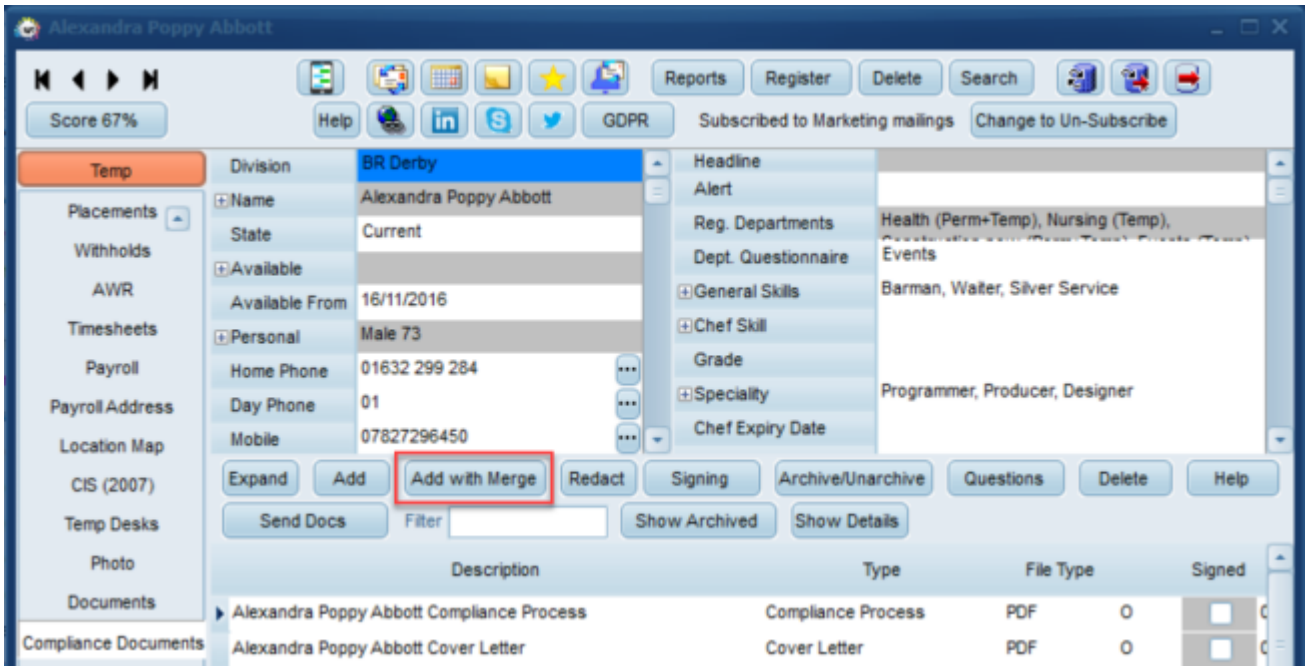
Please also note that if you amend the call back date and or time on the pop up this will be added to your diary for the specified date and time, however you will not get another pop up at the rearranged date and or time.

This feature is enabled at User level and needs to be setup by a System Administrator.

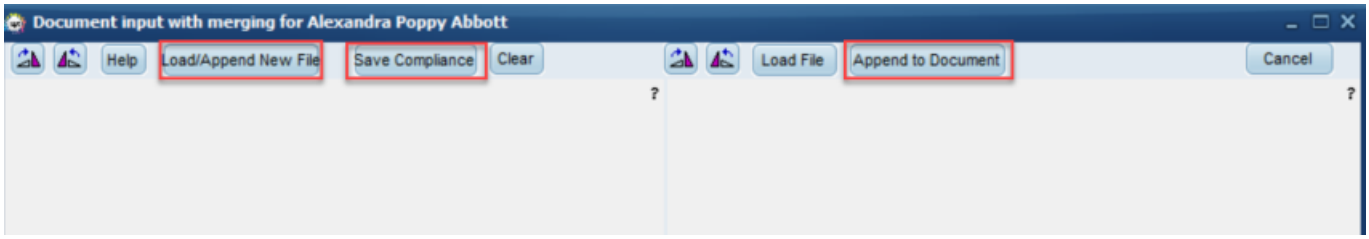
Compliance PDF Documents - Merge two into one

The ability to merge two Compliance PDF Documents into one document has been added. This is particularly useful if the Candidates send the front and back cover separately, or each page separately when they are all part of the same Compliance Document.

When on the Compliance Documents view of a Candidate with a pdf selected click on the Add with Merge button as shown below.



Next click on the Load/Append New file button and select the required file, then click on the Load File button on the second view. Once you have loaded the second file click on the Append to Document button. This will show how the merged file will look. Once you confirm you are happy click on the Save Compliance button.



Please note if the person record already has a Compliance Document of the same type of the new one that you create the old document will be archived.

Drag Documents out of IQX into a folder or Email

The ability to drag Documents or Compliance Documents out of IQX into a folder or outlook email for sending has been added.

This feature requires System Administrator Setup.

ENHANCEMENTS

Notifications Improvements

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

1. Bulk Notifications from a variety of areas

Users can now send Bulk Notifications from certain areas within IQX. This means users will be able to to send the same notification to multiple people in one go with the relevant attachments.

Bulk notifications can be sent from the Person Selector, Company Contact Selector, Vacancy Selector and Placement Selector as well as the following Temp Desk views; Vacancies, Temps, Placements, Vacancy Shifts, Timesheets, Expiry Dates and Compliance.

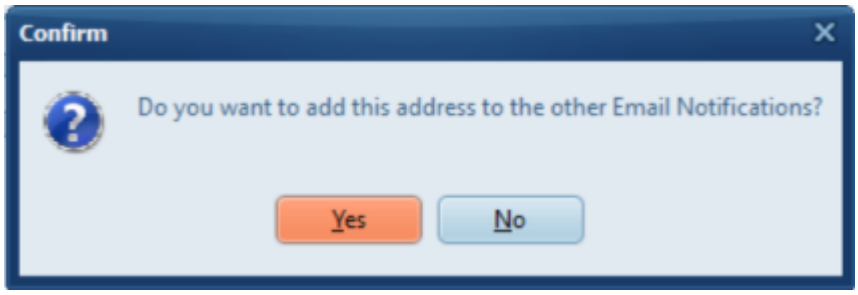
2. Ability to add an additional email address to be sent with all Notifications

In Notifications you can now add an additional email address to be sent with all Notifications.

To add an additional email recipient when the notification screen pops up click on add, a new box will pop up where you can manually enter an email address in the box or click on the 3 dots where you can then search for Company, Candidate, Company Contact and Consultant email addresses.



You will then be prompted to confirm you want to add the address to all notifications.



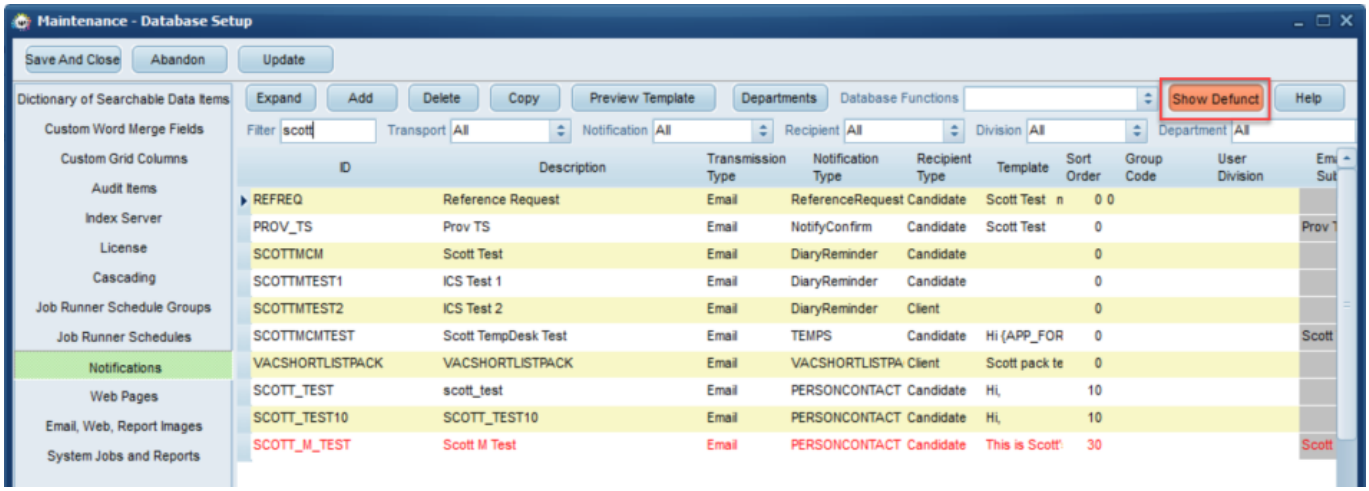
If you select no it will only be added for the selected Notification, however if you click next or previous you are prompted advising that you will lose your changes.

If you select yes when clicking through next and previous you will see the email address has been added for all Notifications. You will also note that the added email address is prefixed with stars, this is removed when the email is being sent.

Please also note that if you remove an address that has been added to all, this will be removed from all Notifications.

3. Button that shows Defunct Notifications

A new button has been added to the Notifications view within Database Setup that allows you to click to ‘Show Defunct’ notifications. If you have defunct notifications the text for these will be highlighted in red so it’s obvious which ones are defunct.



4. Able to specify a start day of week for a range of shifts

The template can be amended so you can specify a start date and subsequent days that the notification will send, this is useful if you are sending next week's rota of shifts out to candidates.

If you wish to set this up please contact IQX Support.

5. Amendment to accessing rates in Notifications

Only works if Rates Schemes using Rate Scripts are set for the vacancy. The rates returned are limited (filtered) to the bands of the shifts being confirmed, so it only pulls through the pay rate that is specific to the shifts being confirmed for the individual.

6. Sending from a Short List - Client receives one email for several candidates

The template can be amended so when sending Notifications to a client from a short list rather than sending individual emails they can receive one email for several candidates.

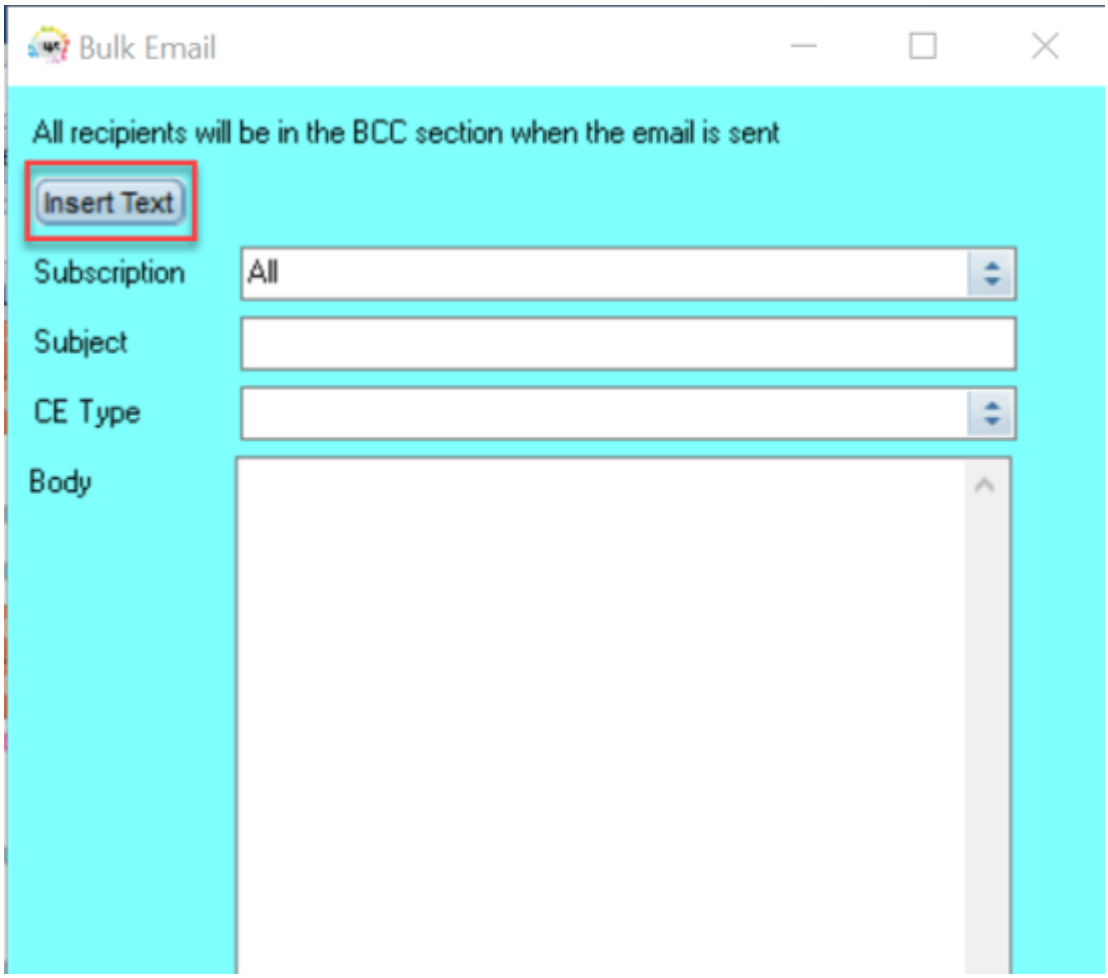
If you wish to set this up please contact IQX Support.

Parse CV added to Fast New Person Wizard

Load CV and Parse CV options have been added to the ‘Fast New’ wizard when adding a new candidate. In addition the ability to enter an ‘Available From’ date has also been added. Previously these options where only available when using the ‘New’ wizard.

Sending Bulk Emails from Person Selector

On the Person Selector when you have highlighted multiple Person records and then click on ‘Bulk Email’ there is a new insert text option. On clicking this it gives a new drop down that contains the Boiler Plate texts of the type Contact Event, once one is selected, the message body is filled.



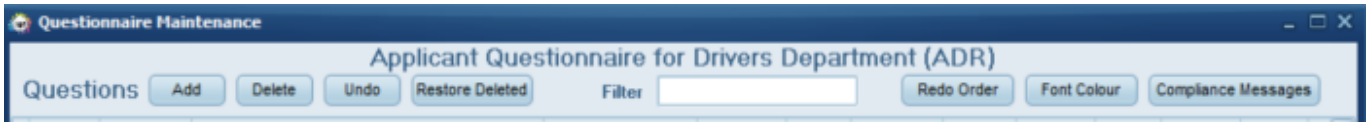
For further information on this please contact IQX Support.

Sort Order added to Desktop - Charts view

A sort order column has been added to the ‘Charts’ view on the Desktop. This means you can give charts a sort order number and then sort them into a more useful order.

Departmental Questionnaires - Shows the Department Code

We have found that so often you look at a departmental questionnaire for the question codes but you cannot remember the Department code. Now when you access a Departmental questionnaire it shows the Department name as well as the Department code.



Sort order of Compliance Document Packs

If you specify a sort order for documents when creating or amending a Compliance Document pack the sort order specified is now obeyed when you send the pack out.

Attaching Global Documents in Emails

When attaching Global documents in emails the documents that show now obey the Division access set at the User level. If a Global Document is set for a specific Division or Divisions, it will not show on the list if the User does not have access to that Division.

Ability to Defunct / Hide Document Templates

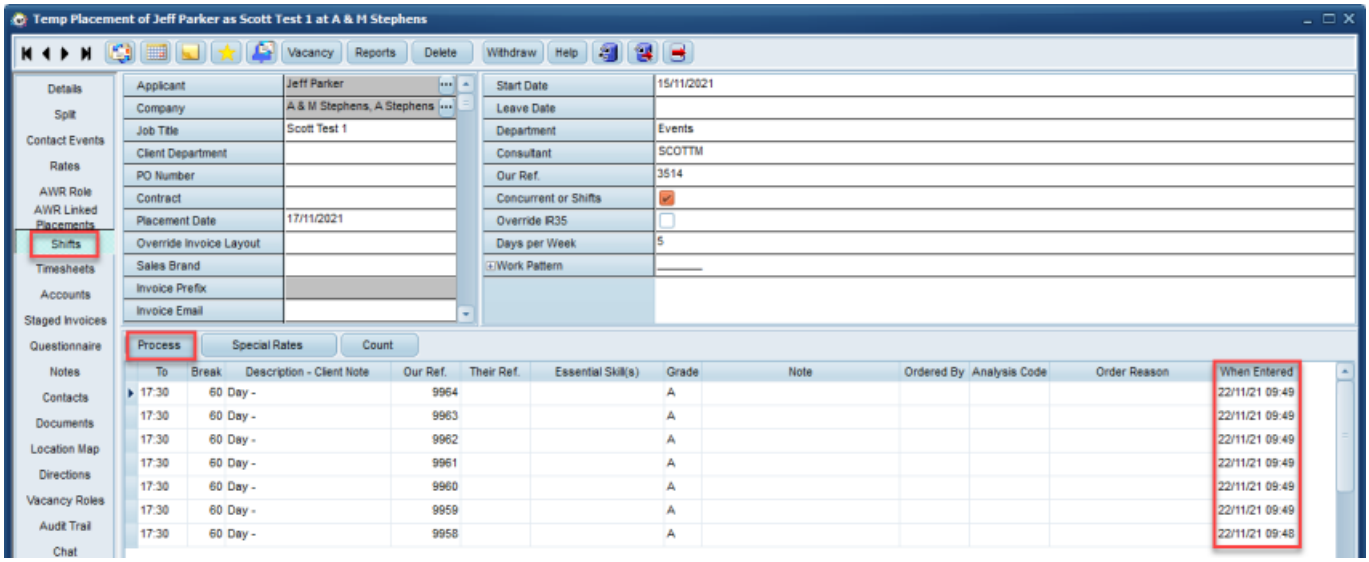
A new Defunct tick box has been added on Document Templates. If this is ticked to mark as Defunct the template will no longer show when you do a mail merge/letter.

Amendment to Placement Withdraws

'Show Placement Withdraw Button' is now a User role rather than a User layout setting. In addition to this you no longer need to have Delete or Manager rights in order to withdraw a Placement, having the 'Show Placement Withdraw Button' User role is sufficient.

Process button and When Entered column added to Placement - shifts view

A 'When Entered' column has been added to the shifts view on Placements.

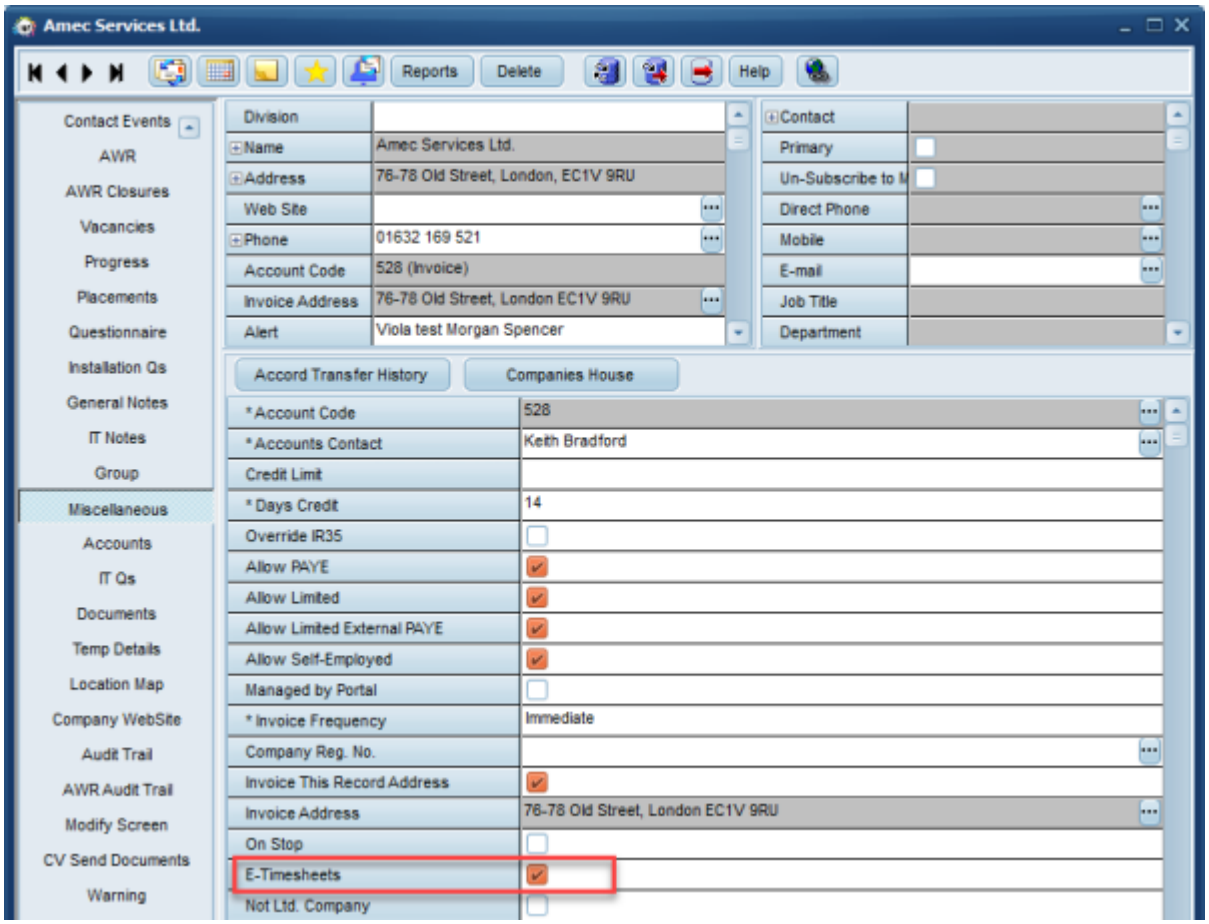


In addition to this a process button has been added to this view which allows you to Process Temps, Vacancies, Companies and Clients against a date range that you can specify and whether the shift is

worked, cancelled etc.

Switch to allow E-timesheets by default

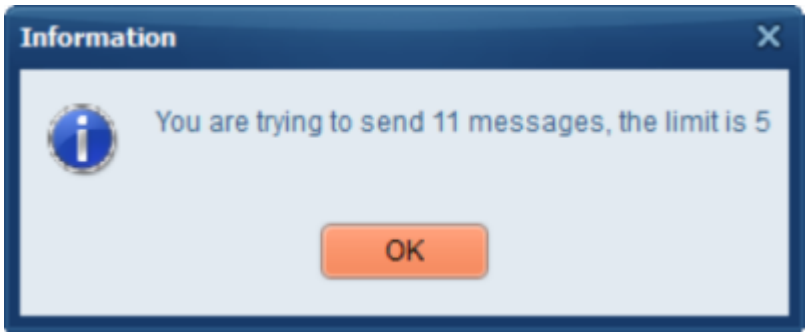
A new General Setting has been created that will allow you to set a company record to have E-Timesheets as the default. This is linked to when you assign an Accounts Contact and after you have done this and saved and refreshed the record the option for E-Timesheets will be ticked.



This feature requires System Administrator setup.

Specify a limit for the number of emails and texts that can be sent

A new general setting has been added that allows you to limit the number of emails and texts that are allowed to be sent in a single mailshot, this helps to prevent thousands being sent.



This feature requires System Administrator setup.

Fixes

- When sending texts from vacancy shortlist the maximum length of SMS set in General settings is now obeyed.
- Issue on Temp Desk Vacancies view when right clicking on a day to get vacancy/booking information for that day it was showing the details for the next day. This has now been fixed.
- Fixed error when changing a vacancy rate.
- Fixed issue where email mail merges were not completing if there was an erroneous email address.
- Fixed issue with Perm Placement invoicing where the invoice email address not going through to the Send Invoices screen.
- When trying to add a new vacancy role it was stuck on the first in the list, this has been fixed.
- Performance issues within Favourites has been fixed.

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Last update: **2022/01/13 17:34**