



Release 2.22.06

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.

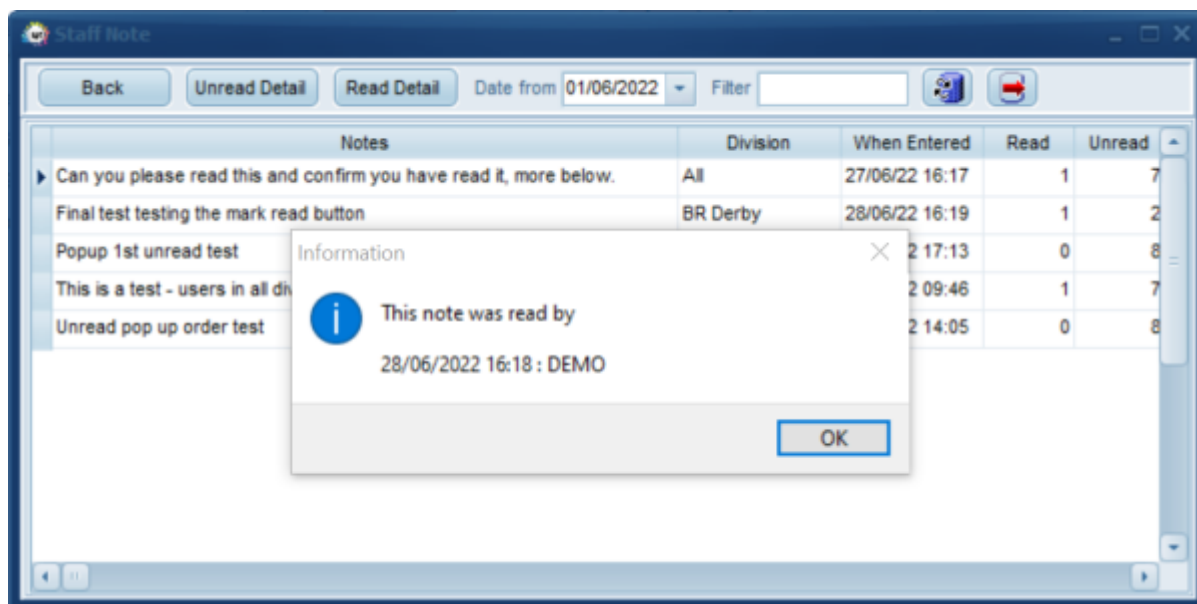
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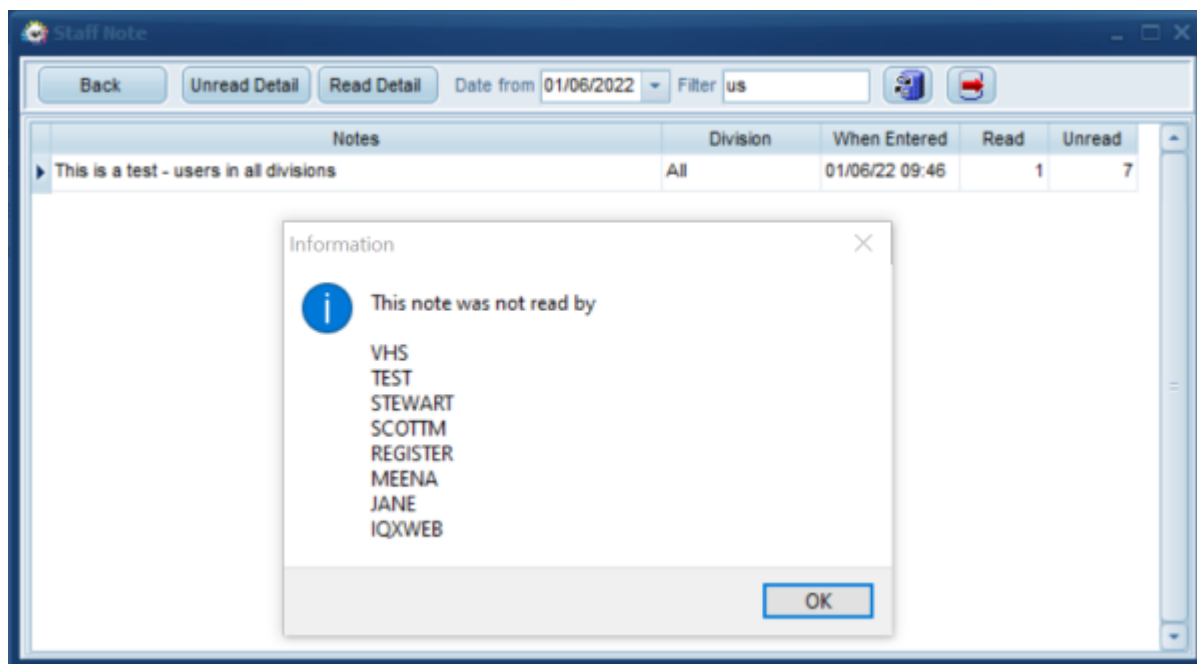
FEATURES

Send notes to groups of Users

A new feature has been created that allows Staff Notes to be sent to Users / Staff in all Divisions or to a specified Division. There are 2 new User roles for this, one that allows a User to create and view Staff Notes and one that allows a User to view Staff Notes.

If you have the role to create Staff Notes once you have created the Staff Note you can track on My Notes who has read the Note and who has still to read it so this is very useful if you have a message that you need to send and you need to know that Staff members have read it.



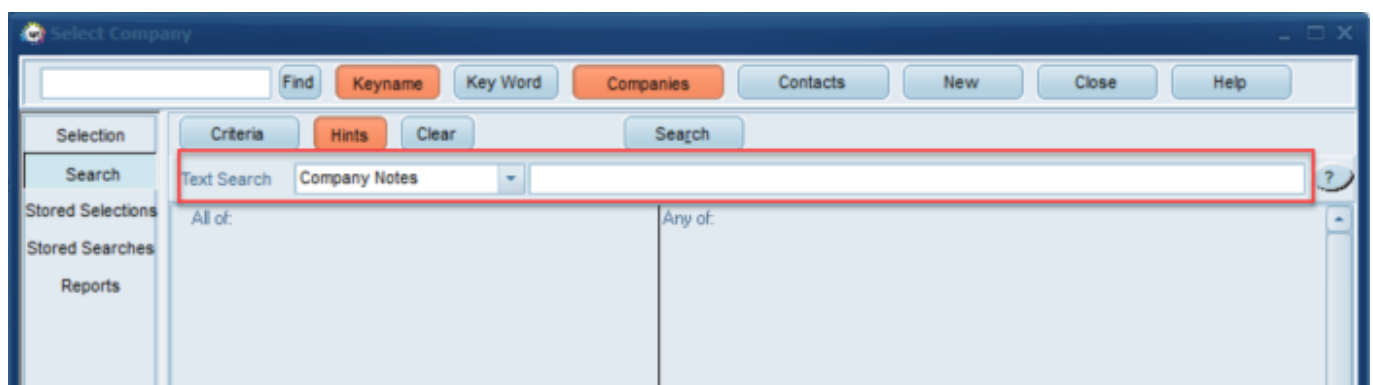


If you have the role that allows you to view Staff Notes you will get a pop up when a note has been added to a Division that you have access to. Once you get this when you double click to open the note this marks it as read and the note creator can then see who has or has not read it.

This feature requires system administrator setup.

Ability to Search on Notes on certain Selectors

Notes can now be set in the top section of the Search view rather than just added through Criteria. You can search notes in the following selectors: Company, Vacancy, Placement and Progress.



Candidates can have a Preferred list of Clients and Shift Types

For agencies whose Candidates like to be able to state that they prefer to work for particular Clients or work specific Shift Types this can now be added to the Candidate record.



Consultants can set the preferred Clients and Shift Types on the new views on the Candidate record.

The screenshot shows the iqx software interface for a candidate record. The candidate's name is Alexandra Poppy Abbott. The interface includes a sidebar with navigation options, a main data entry area, and a right-hand panel with additional details.

Left Sidebar:

- Temp
- Warning
- Payroll Transfers
- Stored Selections
- Chat
- Mailer Lists
- AWR Audit Trail
- Audit Trail
- Consent
- Consent History
- Favourites
- Preferred Shift
- Company
- Preferred Shift
- Template
- Perm
- Accounts
- Compliance

Main Data Entry Area:

Division	BR Derby
Name	Alexandra Poppy Abbott
State	Current
Available	
Available From	16/11/2016
Personal	Male 74
Home Phone	01632 491 309
Day Phone	01632 822 879
Mobile	

Right Panel:

Headline	Currently Placed at: ABBA TAXIS
Alert	
Reg. Departments	Drivers (Perm+Temp)
Dept. Questionnaire	Drivers
Key Skill	
SM Test	
SM Test 2	
SM Test 3	
Less than 40	

Bottom Section:

Company: A & M Stephens

Now, when booking shifts from the Candidates point of view using Person - Diary - Book button or Temp Desk - Temps - Book Shifts button, Consultants can see at a glance which shifts are with preferred Clients or Shift Types.

In the below example it has been set that the Candidates preferred Client is A & M Stephens and the preferred Shift Type is Day.

The Pref column will show if the shifts are with preferred Clients, Shift Types, both or indeed none (in which case it is blank).



Pref.	Company	Job Title	Ref.	Date	From	To	Description	Mins	Book	Status	Send Note	Client Note
Client	A & M Stephens	SM Test 8	10...	Wed 29/12/2021	18:00	06:00	Night		☐	Possibly Available	☐	
Client	A & M Stephens	SM Test 8	10...	Thu 30/12/2021	18:00	06:00	Night		☐	Possibly Available	☐	
Client	A & M Stephens	SM Test 8	10...	Thu 30/12/2021	18:00	06:00	Night		☐	Possibly Available	☐	
Type	F&C Asset Managemen...	Driver	10...	Thu 21/04/2022	08:00	17:30	Day		☐	Possibly Available	☐	
Both	A & M Stephens	Scott Test 1	10...	Mon 06/06/2022	08:00	17:30	Day		☐	Possibly Available	☐	
Both	A & M Stephens	Scott Test 1	10...	Tue 07/06/2022	08:00	17:30	Day		☐	Possibly Available	☐	
Both	A & M Stephens	Scott Test 1	10...	Wed 08/06/2022	08:00	17:30	Day		☐	Possibly Available	☐	
Both	A & M Stephens	Scott Test 1	10...	Thu 09/06/2022	08:00	17:30	Day		☐	Possibly Available	☐	
Both	A & M Stephens	Scott Test 1	10...	Fri 10/06/2022	08:00	17:30	Day		☐	Possibly Available	☐	
	F&C Asset Managemen...	Driver	10...	Mon 04/07/2022	18:00	06:00	Night		☐	Possibly Available	☐	
Both	A & M Stephens	SM Test 8	10...	Mon 11/07/2022	08:00	17:30	Day		☐	Possibly Available	☐	
Both	A & M Stephens	SM Test 8	10...	Mon 11/07/2022	08:00	17:30	Day		☐	Possibly Available	☐	
Both	A & M Stephens	SM Test 8	10...	Tue 12/07/2022	08:00	17:30	Day		☐	Possibly Available	☐	
Both	A & M Stephens	SM Test 8	10...	Tue 12/07/2022	08:00	17:30	Day		☐	Possibly Available	☐	
Both	A & M Stephens	SM Test 8	10...	Wed 13/07/2022	08:00	17:30	Day		☐	Possibly Available	☐	
Both	A & M Stephens	SM Test 8	10...	Wed 13/07/2022	08:00	17:30	Day		☐	Possibly Available	☐	
Both	A & M Stephens	SM Test 8	10...	Thu 14/07/2022	08:00	17:30	Day		☐	Possibly Available	☐	

This feature requires system administrator set up.

Ability to have Webapp push notification

If IQXWeb Apps have been enabled for your Agency IQX can create jobs to send Push Notifications to all or a selection of the registered Users from the Person or Client selectors.

The end device must have activated notifications to receive.

Requires Setup by System Administrator and IQX Support.

Desk Top Inbox - Filter and Search

Ability in Desk Top Inbox to Filter on the Fetched Records in the grid to reduce the list, and to Search for any email within the currently selected folder that is not displayed within the limited fetched records.

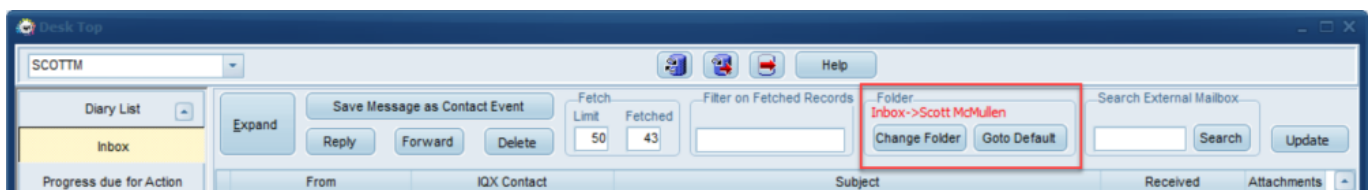
This is really useful if the number of emails contained within the folder exceeds the fetch limit set.



ENHANCEMENTS

Desk Top Inbox - Default folder indication

When going to your inbox on the Desk Top it remembers your chosen folder from when you last had the inbox open. To make it easier to tell which email folder you are viewing a label has been added in red stating the current folder and a button to 'Go to Default' which will revert to your inbox or your specified default startup folder.



Collections Improvements

On Desktop - Collections the number of Users in chat and attached documents columns have been moved to a more prominent position on the left so Users can easily see this information without scrolling to the far right.

Notification Enhancements

The Notification form now can have a change of size and position saved for the future on right click on the record icon, as in other forms.

As the complexity of Notifications has increased we have attempted to add features for ease of administration. There is now colour coding with the lines are coloured according to type, matching the record colours.

Also the Types have been extended to start with the part of the system they are going to be used by which means clearer grouping in Maintenance.

On Person Progress, Person Search Results and Person Book Shifts it is now possible to combine the linked records in a Notification - many to one.

This means you can combine Progress on several Vacancies in one notification, or a range of shifts across different clients from a Book Shifts Search.

Instead of sending many emails, you can now send a single message to a Candidate asking if they are interested in the shifts or vacancies selected across different Clients.



IQX-2244

Template: ☒ Create Contact Event

Recipients:

Subject:

Comment (for all):

25th May 2022 08:00-17:30 5 4 Hawkins Brown Ltd.
26th May 2022 08:00-17:30 5 4 Hawkins Brown Ltd.
30th May 2022 18:00-06:00 5 4 A & M Stephens
30th May 2022 11:00-23:00 5 4 ABBA Ltd
31st May 2022 18:00-06:00 5 4 A & M Stephens

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The same Notification Type was originally used on Fill Shifts and on Confirm Shifts - these have now been separated.

Save to Documents option: If the Notification has been set up with Save to Docs option then the button will save the contents of the Notification as a pdf in Documents view.

In the setup of Notifications you can select a Contact Event Type to be used when the Notification is sent.

The Comment to All is attached by default at the end; there is now a field that can be used with html so that the position can be controlled.



In order to ensure the linked data is picked up in attached reports there are new parameters to identify precise shifts.

Grouping is possible so that vacancies can have associated shifts in a table.

Mail Merge fields can be set up for Shift Rates for the different sections, and broken down into the correct pay for each section such as Day, Night, Weekend. Also possible to split into base pay and holiday pay

Mail Merge fields can be set up for Provisional Timesheet Shifts.

Please contact IQX Support if you require assistance in setting up the notification templates.

Company record now shows Registration Date

It is now clear when the Client was registered within IQX due to a new field within the Client record.

Person and Company - new Favourites view

If a Candidate, Company or Company Contact has been added to multiple favourites lists there is a new 'Favourites' view at the bottom of their record that details what favourites lists they are included in.

Person - Progress view - now includes a Remove button

On the Person - Progress view there is a Remove button to be taken of the short list of the selected vacancy

Person - Progress view - tick box column moved to left so always in sight

The Select tick boxes on person - Progress have now been moved to the left hand side of the view to make it easier for Users to select the records they want. Particularly useful when you are sending notifications from this view.



Select	Job Title	Company	Consultant	Next Action Date	State
☐	Scott Test 1	A & M Stephens	SCOTTM	14/12/2021	Invite to 1st interview
☐	Scott M Test	A & M Stephens	SCOTTM	10/04/2020	Rejected - another placed
☐	asdf	10 Group PLC	SCOTTM	06/08/2019	Awaits Contact

Secondary Agency record - Redesign of fields

If a candidate is as Secondary Agency candidate you can edit their agency, reference and status on the top right headline view on their candidate record, but only by clicking the ... button next to the Secondary Agency Name.

Name	Reference	State
Scott McM Test	SMTEST1	Compliant



Search both Contract and Shift vacancies, ensuring future shifts exist

When Searching from a Person record there is the option to look for both Contract and Shift Vacancies. Now there is the option to ensure there are existing future shifts when searching the Shift Vacancies.

Search for Vacancies	
Select department and vacancy type and press Next	
Department	Drivers
Permanent	☒
Temp	☒
Vacancy Status	Current
Desk Type	Weekly Shift
Future Shifts	Future Shifts

Booking shifts from Temp Desk or Candidate Record now has criteria filter view

There is a new filter when searching for shifts from Temp Desk>Temps>Books Shifts or Person record>Diary>Book.

For details on how to search for a shift from a temp please see [Searching for Shifts](#)

Online Web References - Can now be edited before sending to the referee

You are now able to edit a Candidate reference before it is sent from IQX, this can be used if a Candidate provided an incorrect email address and/or name.



You can edit the reference before it has been sent as shown below

Reference Request for Alexandra Poppy Abbott from Scott McMullen at IQX Limited

Report Save and Close Abandon Update

Department	Drivers
Reference Type	Professional
☐ Referee Name	Scott McMullen
— Referee Name	Scott McMullen
— Salutation	
Organisation	IQX Limited
Referee Job Title	Support Manager
☐ Address	
— Addr1	
— Addr2	
— Addr3	
— Town	
— County	
— Country	
— PostCode	
☐ Contact Details	Email: scott.mcmullen@iqx.co.uk
— Home Phone	
— Work Phone	
— Mobile Phone	
— Fax	
— Email	scott.mcmullen@iqx.co.uk
Job Title	Delivery Driver
Job Title Notes	Good reliable worker, always on time
Consultant	SCOTTM
Created	19/07/22 13:31
Approved to Send	☐
Ask Candidate Before Send	☐
Sent to Referee	
Reminder Blocked	☐
Last Reminder	
Completed by Referee	
Process Completed	
Reference Refused	

If it has already been sent to the Referee it can't be edited, again shown below



Reference Request for Alexandra Poppy Abbott from James Joyce at Wicklow Marketing

Report Save and Close Abandon Update

Department	Events
Reference Type	Personal
Referee Name	James Joyce (James)
Organisation	Wicklow Marketing
Referee Job Title	HR
Address	1 The Town Square, Melrose, TD6 9JJ
Addr1	1 The Town Square
Addr2	
Addr3	
Town	Melrose
County	
Country	
PostCode	TD6 9JJ
Contact Details	Email: jj@wicklow.com
Home Phone	
Work Phone	
Mobile Phone	
Fax	
Email	jj@wicklow.com
Job Title	Marketing Assistant
Job Title Notes	Assisting on major clients
Consultant	VHS
Created	06/12/13 15:51
Approved to Send	☐
Ask Candidate Before Send	☐
Sent to Referee	20/01/20 13:14
Reminder Blocked	☐
Last Reminder	
Completed by Referee	
Process Completed	
Reference Refused	

Online Web References - Selection of Types to process that results in different Questions being displayed

When Consultants add an Online Web Reference for a Candidate, the Consultant has the option to select either Personal, Professional or Other Reference to be sent to the Referee. When selecting a Personal Reference the Consultant can view a list of Questions associated with that Reference type.

In the next iqxWEB release, Candidates can select the type of Reference they would like to request,



and Referee will be able to answer specific questions according to the Reference Type.

This feature requires Systems Administrator setup.

Placement Extensions - Extension reason is non editable

When adding a placement extension the extension reason is no longer greyed out and Users cannot manually type in the box

Placement - Shifts view - now has Confirm button

Placements Shifts view now has Confirm button

Direct Engagement Message changed to include Inside IR35

When using the Direct Engagement button on a Placement the message has been changed to 'Will this Direct Engagement be calculated for PAYE using Vacancy ENI percent or be Inside IR35?'

Vacancy search criteria created that finds Active Broadbean Adverts

If your agency use Broadbean you can now have a vacancy searchable criteria added that will show the number of Active Broadbean Adverts.

This feature requires System Administrator setup.

Stored Search views now have a column for Department

With a new column on the Stored Search Selector, you can see clearly to which Departments the Stored Search relates.



Owner	Name	Department
CATHERINE	Candidates with no Department	
CATHERINE	Class 1 & Clear DBS	Drivers
CATHERINE	Full Clean Driver License	Education
CATHERINE	Grade 1, 3 & 7	Health
CATHERINE	Head Chef Roles	Catering
CATHERINE	PIN Expired	Health

Extension of Ops Teams to wherever there is a Consultant dropdown on a selector

On the Temp Desk, we now have the option to filter by your Teams in all positions with an active Consultant drop down.

Temp Desk - Contract - Availability view - right click shows work pattern days

On a Contract Temp Desk, Availability view, right clicking on a cell now shows the days of the work pattern set in the placement.

Temp Desk - Expiry dates - ability to Exclude some Expiry Dates by Person state

There is now a way to set an Expiry date for a selection of Candidate states so, when that Candidate has an expiry date which may not be required for some Candidate State, it is not enabled.

For example, a British passport may be necessary for pre-registration Candidates, but not once they are Current.

If set not for Current then it won't show red in the 'Expiry Dates' area of the 'Temp Desk' for current Candidates or be included in the Days before Expiry or Shifts after Expiry count.

This enhancement relates only to the display on the Temp Desk Expiry dates view and does not affect the Compliance Score.



Not Required for 'Current' Candidates

The screenshot shows the Temp Desk interface with the 'Expiry Dates' option selected. The 'Temp to Show' dropdown is set to 'All'. The table lists candidates with their expiry dates. A red box highlights the 'DBS Expiry maximum length Lead 60' column, which shows dates like 02/10/2011, 05/06/2016, and 03/12/2015. The 'Visa Expiry Lead 60' column shows dates like 23/05/2022 and 05/06/2011.

Name	alert	Days before Expiry	Shifts after Expiry	DBS Expiry maximum length Lead 60	Visa Expiry Lead 60	First Aid Expiry Lead 30	Scott Expiry Test Lead 30
William Joseph Barnard				02/10/2011			
Ralph Black				05/06/2016			
Johnny Bradley				03/12/2015			
Onieka Brown		-51		13/04/2017	23/05/2022		
Lukas Cerry				31/08/2016			
Ozlem Demirci		-4060	6		05/06/2011		
Sandra Donnelly				08/05/2016			
Kevin Drummond				16/07/2014			
Wilfred Edie				18/02/2017			
Maxwell Ejikeme				01/05/2018			
Sandeep Gangar				23/02/2017			
Norman Gilsonan				26/04/2017			
Mr Martin Gunnarsson		-3896			17/11/2011		
Stuart Humphries				23/11/2014			
Mohamed Jaloh				26/06/2016			
Radoslaw Janicki				01/07/2016			

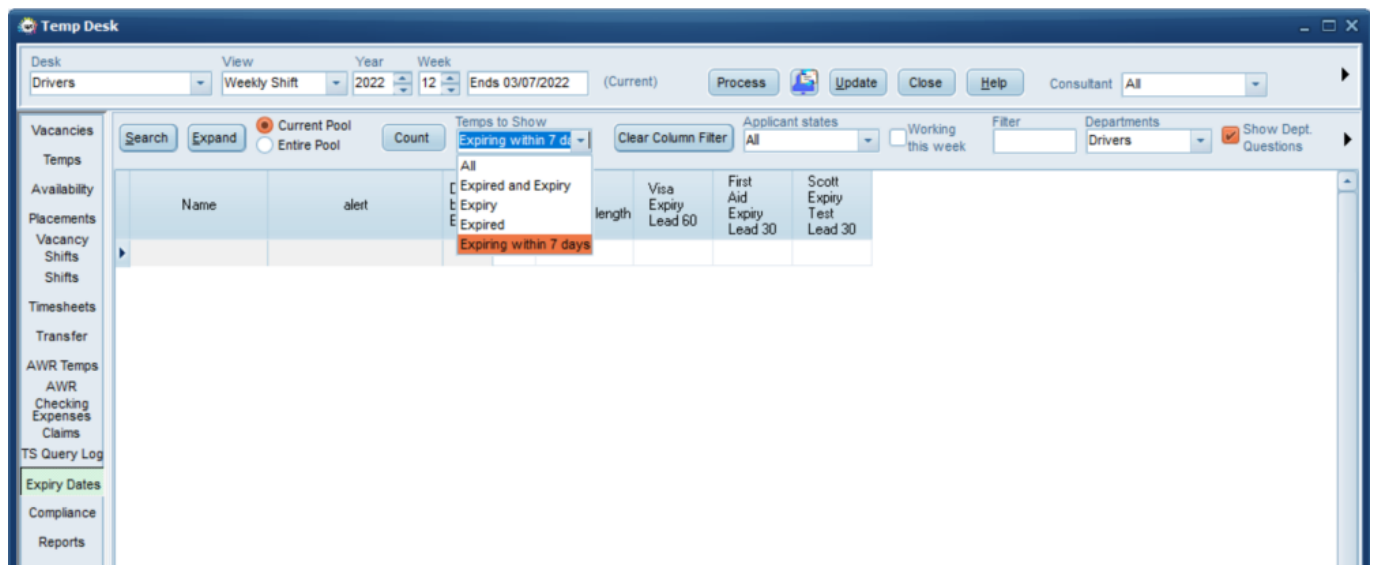
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Name	alert	Days before Expiry	Shifts after Expiry	DBS Expiry maximum length Lead 60	Visa Expiry Lead 60	First Aid Expiry Lead 30	Scott Expiry Test Lead 30
William Joseph Barnard		-3942		02/10/2011			
Ralph Black		-2234		05/06/2016			
Johnny Bradley		-2419		03/12/2015			
Onieka Brown		-1922	1	13/04/2017	23/05/2022		
Lukas Cerry		-2147		31/08/2016			
Ozlem Demirci		-4060	6		05/06/2011		
Sandra Donnelly		-2262		08/05/2016			
Kevin Drummond		-2924		16/07/2014			
Wilfred Edie		-1976	9	18/02/2017			
Maxwell Ejikeme		-1539		01/05/2018			
Sandeep Gangar		-1971		23/02/2017			
Norman Gilsonan		-1909		26/04/2017			
Mr Martin Gunnarsson		-3896			17/11/2011		
Stuart Humphries		-2794		23/11/2014			
Mohamed Jaloh		-2213		26/06/2016			
Radoslaw Janicki		-2208		01/07/2016			

Temp Desk - Expiry Dates option to only show Expiring within 7 days

On Temp Desk, Expiry Dates the Temps to Show drop down box has an additional filter for Expiring within 7 days



Temp Desk - Consultant filter on Temp Desk - hover text added

Hover Text added to Consultant filter on Temp Desk to make it clear which Temp Desk Views the filter applies to.

Temp Desk - Vacancies - Set up background colour on shift cells

An new function to change a cell background colour on Shift Temp Desks, Vacancies according to custom criteria, such as having a Client Note exist.

Shift Quick Fill - Modification to find by Serial Number or Client Ref

When using the 'Quick fill Shift' button, it now searches using the shift their ref making it easier to locate the required shift.

The 'Quick Fill Shift' button requires activation in your User record.

Shift Viewer - Text filter added

A new text filter has been added to the shifts view on the temp desk allowing Users to quickly identify shifts with a particular reference, job title or client.



Temp	Company	Vacancy	Date	From	To	Break	Description	Our Ref.	Their Ref.	Essential Skill
Ian Warnes	A & M Stephens	Labourer	Mon 05/04	08:00	17:30	60 Day		9860		
Ian Warnes	A & M Stephens	Labourer	Tue 06/04	08:00	17:30	60 Day		9861		
Ian Warnes	A & M Stephens	Labourer	Wed 07/04	08:00	17:30	60 Day		9862		
Ian Warnes	A & M Stephens	Labourer	Thu 08/04	08:00	17:30	60 Day		9863		
Ian Warnes	A & M Stephens	Labourer	Fri 09/04	08:00	17:30	60 Day		9864		
Ian Warnes	A & M Stephens	Labourer	Sat 10/04	08:00	17:30	60 Day		9865		
Ian Warnes	A & M Stephens	Labourer	Sun 11/04	08:00	17:30	60 Day		9866		
James Bolton	A & M Stephens	Scott C&C Test	Mon 12/04	08:00	17:30	60 Day		9893		
Joe Bloggs	A & M Stephens	Scott C&C Test	Mon 12/04	08:00	17:30	60 Day		9905		
Onieka Brown	A & M Stephens	Scott C&C Test	Tue 13/04	08:00	17:30	60 Day		9894		
Joe Bloggs	A & M Stephens	Scott C&C Test	Tue 13/04	08:00	17:30	60 Day		9899		
Joe Bloggs	A & M Stephens	Scott C&C Test	Wed 14/04	08:00	17:30	60 Day		9895		
Joe Bloggs	A & M Stephens	Scott C&C Test	Thu 15/04	08:00	17:30	60 Day		9901		
Tracy Buchan	A & M Stephens	Scott C&C Test	Thu 15/04	08:00	17:30	60 Day		9896		

Shift Viewer - Now indicates which unfilled shifts have short lists

Now when a shift has a short list of Temps set up the Temp column on the main view will contain a count of number short listed, to be seen when shift expanded.

Shift Viewer - Shift Filter box - Option to 'Save as my Default'

On the Shifts Viewer, when selecting the Filters in the box on the right, you can now save your preferred filter set-up for using again or as a starting point, the next time you open the form.

Confirming Shifts - New method of selecting All/None by right click

To make the Confirm Shifts form more User friendly with Notifications options rather than buttons above each column you can now right-click the headers for certain columns to select all. Columns that you are able to do this on are marked with a *.



Our Ref.	Date	From	To	Description	Person	Cancelled	Cancel Reason	Confirmed	Their Ref.	Grade	Note	Send Query	Notify Client	Notify Temp
10...	Wed 29/06/2022	08:00	17:30	Day	McMullen, Louise	☐		☐				☐	☐	☐
10...	Thu 30/06/2022	08:00	17:30	Day	McMullen, Louise	☐		☐				☐	☐	☐
10...	Fri 01/07/2022	08:00	17:30	Day	McMullen, Louise	☐		☒				☐	☐	☐

Questionnaire maintenance - Filter on Choices

A filter has been added to the Choices section of all Questionnaire Maintenance forms.

Order	Question ID	Question Description	Type	Min Step Size	Units	Required	Group	Wizard Group	Audit	Web Publish	Web View	Search Hide
211	CRX	DBS Expiry maximum length of text test for test pu	Date			☐	-200	0	☒	☐	☐	☐
215	JK	DBS check recieved	Date			☐	-200	0	☒	☐	☐	☐
300	H3	*** ID ***	Heading			☐	-230	0	☐	☐	☐	☐
310	NAT	Nationality	Text			☐	-230	0	☒	☐	☐	☐
315	VE	Visa Expiry	Date			☐	-230	0	☐	☐	☐	☐
315	VS	VISA Type	Single Selection			☐	-230	0	☐	☐	☐	☐
315	IDS	ID Shown	Multiple Selection			☐	-230	0	☐	☐	☐	☐

Order	Choice ID	Choice Description	Autofill search words (comma separated)	Value	Web Hide	Analysis
10	A1	Passport			☐	
20	A2	Birth Certificate			☐	
30	A3	Marriage Certificate			☐	
40	A4	Visa View			☐	
50	A5	Driving Licence			☐	

This is really handy if there is a huge list of choices for a particular question.

Maintenance - Custom Columns option to select 'ALL' departments

A quicker way to access all the custom columns for all departments, there is now a drop down for 'All' departments with custom columns



Maintenance - Database Setup

Save And Close Abandon Update

Dictionary of Searchable Data Items

Custom Word Merge Fields

Custom Grid Columns

Audit Items

Index Server

License

Cascading

Job Runner Schedule Groups

Job Runner Schedules

Notifications

Push Notification Templates

Web Pages

Email, Web, Report Images

System Jobs and Reports

Department All Form View List All

Add Delete Filter Help

Department	Form	View	Column Name	Caption	Position	Column Type	Data Type	Stri Len
▶ DEFAULT	COMPANY	PEOPLE	Callbackdate	Call Back Date	6	DataField	Date	
DEFAULT	COMPANY	PEOPLE	SiteAddress	Site Address	15	Question	String	
DEFAULT	COMPANY...	DETAILS	CS1	Last CE	8	DataField	Date	
DEFAULT	COMPANY...	DETAILS	CS2	Last PI Start Date	9	DataField	Date	
DEFAULT	COMPANY...	DETAILS	CS3	Code	10	DataField	String	
DEFAULT	DESKTOP	VACANCIES	DKV1	Location	17	DataField	Memo	
HE	PERSONS...	DETAILS	last contact	last contact	7	DataField	Date	
DEFAULT	PLACEME...	DETAILS	LS1	Transport	9	DataField	Memo	
DEFAULT	VACANCY	SEARCHR...	SV1	Salary	7	Question	Integer	
DEFAULT	VACANCY...	DETAILS	VS1	Town	9	DataField	String	
HE	PERSONS...	DETAILS	consultant	consultant	6	DataField	String	
DEFAULT	DESKTOP	CONTACTS	Orderby	Order By	3	DataField	String	
DR	PERSONS...	DETAILS	STATE	state	10	DataField	String	
HE	PERSONS...	DETAILS	STATE	Status	5	DataField	String	

IQXAnywhere report export option of .xlsx

IQXAnywhere now has the report export option of .xlsx

Ability to insert an html table into Boiler Plate Text

It is now possible to put a table into boiler plate text so that it can be used by Consultants in contact events to record interview notes etc.

Users should convert the contact event to HTML and then insert the boiler plate text for the table to appear.

This feature requires Systems Administrator setup.

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

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release_2.22.06

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