



# Release 2.3.4

## Features

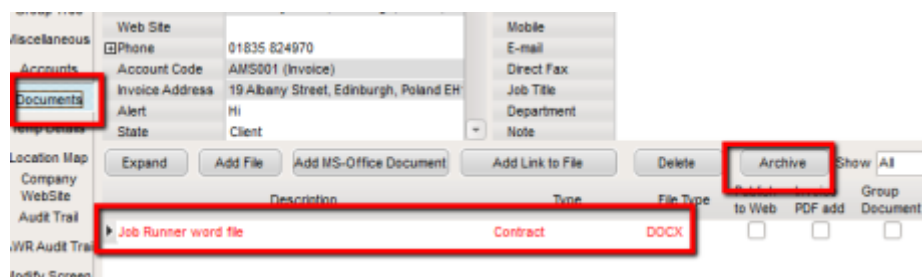
### Users

#### New Ability to Archive

Documents can now be archived in all document views. Once archived the file text will turn red. These files will not be available when attaching documents to emails.

When viewing a range of documents it is possible to filter them by All, Archived or Live documents. The default is All.

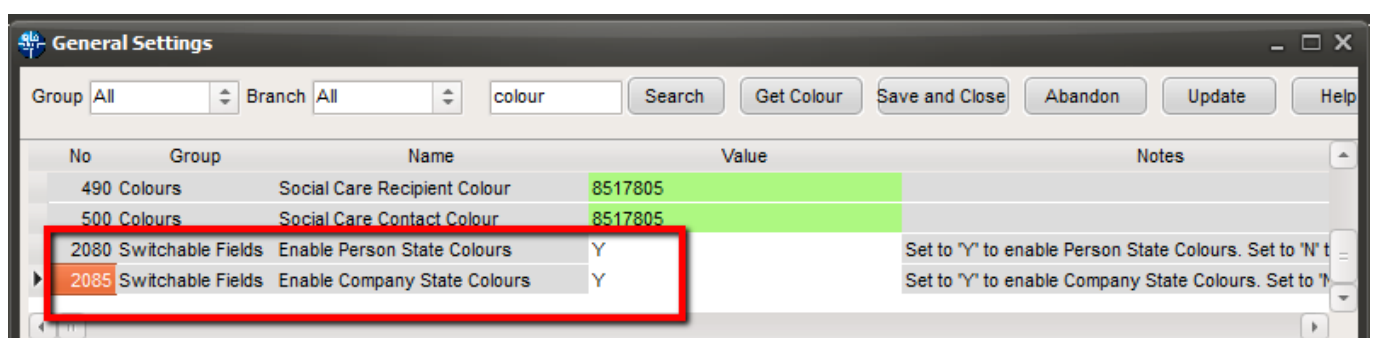
To access this feature from any view – Documents – Select a file – Use the Archive button



#### Alternative Form Background Colour

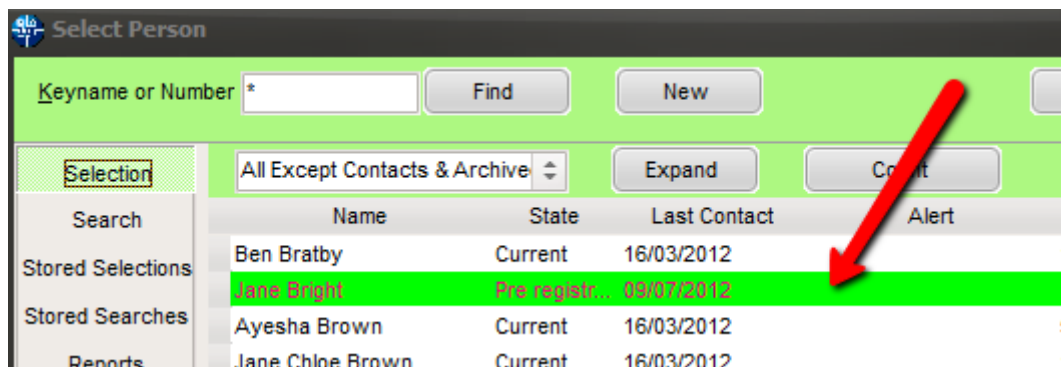
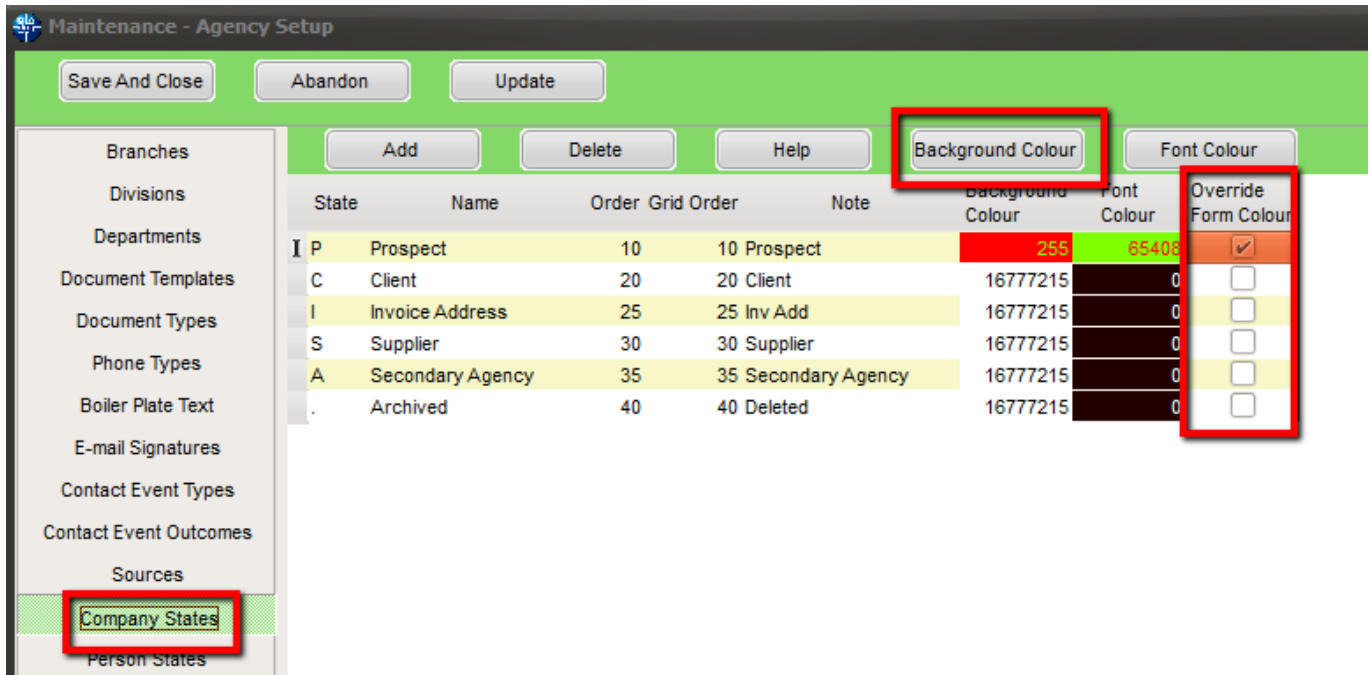
This feature allows the Company or Person form colour to be changed according to the record state.

To configure this feature – Maintenance - General settings – Search on 'colour' - switchable fields (2080 and 2085) – set the fields to Y – Click the Update button – Click on the Save and Close button.



Set colours via Maintenance - Agency Setup - Person and Company States - Tick the Override Form Colour box. Use the Background Colour button to select a new colour.

Note: Using this feature overrides the new look colour palette when viewing a Person or Company record.



## Alternative Font Colour on a Selector

This feature allows the Company or Person font colour to be changed according to the record state.

To configure this feature - Maintenance - General settings - Search on 'colour' - switchable fields (2080 and 2085) - set the fields to Y - Update - Click on the Save and Close button.



General Settings

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

| No   | Group             | Name                         | Value   | Notes                                                              |
|------|-------------------|------------------------------|---------|--------------------------------------------------------------------|
| 490  | Colours           | Social Care Recipient Colour | 8517805 |                                                                    |
| 500  | Colours           | Social Care Contact Colour   | 8517805 |                                                                    |
| 2080 | Switchable Fields | Enable Person State Colours  | Y       | Set to 'Y' to enable Person State Colours. Set to 'N' to disable.  |
| 2085 | Switchable Fields | Enable Company State Colours | Y       | Set to 'Y' to enable Company State Colours. Set to 'N' to disable. |

Set colours via Maintenance - Agency Setup - Person and Company States - Tick the override form colour column. Use the Font Colour button to select a new colour.

Maintenance - Agency Setup

Save And Close Abandon Update

Branches Divisions Departments Document Templates Document Types Phone Types Boiler Plate Text E-mail Signatures Contact Event Types Contact Event Outcomes Sources Company States **Person States** Vacancy States

Add Delete Unused Codes Background Colour **Font Colour** Help

| Code | Name             | Order | Grid Order | Note                       | Publish To Web           | Set On Web               | Background Colour | Font Colour | Override Form Colour                |
|------|------------------|-------|------------|----------------------------|--------------------------|--------------------------|-------------------|-------------|-------------------------------------|
| C    | Current          | 1     | 1          | Currently looking for w... | <input type="checkbox"/> | <input type="checkbox"/> | 16777215          | 0           | <input type="checkbox"/>            |
| P    | Placed           | 2     | 2          | Placed                     | <input type="checkbox"/> | <input type="checkbox"/> | 16777215          | 0           | <input type="checkbox"/>            |
| L    | Client           | 3     | 3          | Client                     | <input type="checkbox"/> | <input type="checkbox"/> | 16777215          | 0           | <input type="checkbox"/>            |
| I    | Pre registration | 4     | 4          | Added - not enough de...   | <input type="checkbox"/> | <input type="checkbox"/> | 6388863           | 4259834     | <input checked="" type="checkbox"/> |
| A    | Not Active       | 6     | 6          | Deleted                    | <input type="checkbox"/> | <input type="checkbox"/> | 16777215          | 0           | <input type="checkbox"/>            |
| D    | Secondary Agency | 10    | 10         | Secondary Agency Temp      | <input type="checkbox"/> | <input type="checkbox"/> | 16777215          | 0           | <input type="checkbox"/>            |
| N    | Client/Candidate | 11    | 11         | ljkh                       | <input type="checkbox"/> | <input type="checkbox"/> | 16777215          | 0           | <input type="checkbox"/>            |
| Z    | Umbrella         | 20    | 20         | Umbrella improt tests      | <input type="checkbox"/> | <input type="checkbox"/> | 16777215          | 0           | <input type="checkbox"/>            |
| .    | Archived/DNU     | 99    | 99         | Deleted                    | <input type="checkbox"/> | <input type="checkbox"/> | 16777215          | 0           | <input type="checkbox"/>            |

Select Person

Keyname or Number \* Find New Close

Selection All Except Contacts & Archive Expand Count

| Search            | Name             | State          | Last Contact | Alert    |
|-------------------|------------------|----------------|--------------|----------|
| Stored Selections | Ben Bratby       | Current        | 16/03/2012   | 1627 Cu  |
| Stored Searches   | Jane Bright      | Pre registr... | 09/07/2012   |          |
| Reports           | Ayesha Brown     | Current        | 16/03/2012   | 56 Ivanh |
|                   | Jane Chloe Brown | Current        | 16/03/2012   | 1 Carrut |

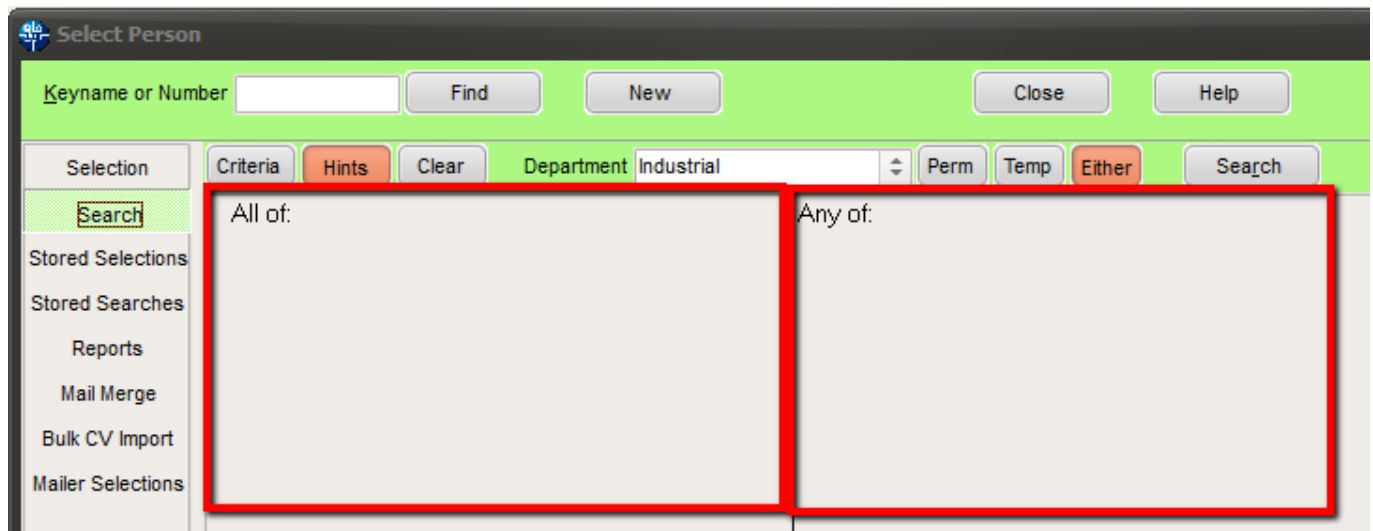
## Search Hints

Some users are unaware of the different search views on the search screen. Therefore, the hints function has been set on. The text can be temporarily hidden by clicking Hints button.



Permanently hiding the Hints require System Administrator configuration for each user.

To access this feature - People - Search



## Increased information in the About Box

Information in the about box has been improved to display the first three digit Version numbers which changes when New Features are added and Build numbers which change when fixes and new builds are incorporated into the program.

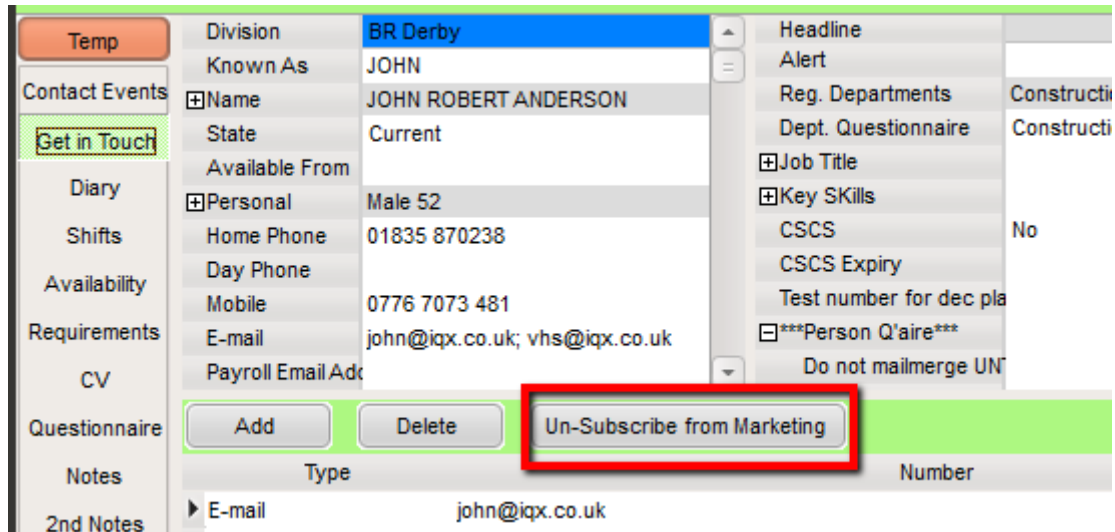
Access this feature - Help - About



## Mailmerge - Unsubscribing to Marketing

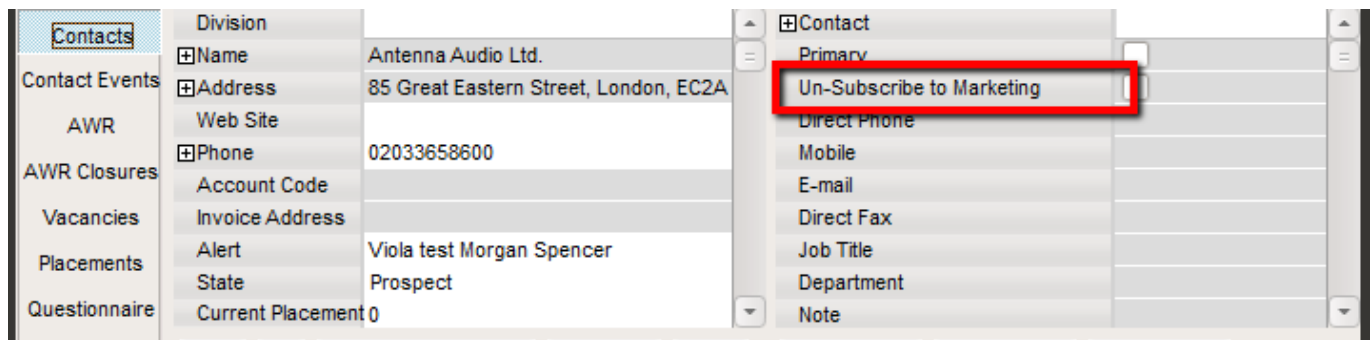
As part of the mailmerge process it is now possible to unsubscribe to Marketing on Person and Company Contacts.

To access this feature from a candidate - People - search and select a person - Get in touch (side bar) - Click the Un-Subscribe to Marketing button.



|                |                  |                               |                             |            |
|----------------|------------------|-------------------------------|-----------------------------|------------|
| Temp           | Division         | BR Derby                      | Headline                    |            |
| Contact Events | Known As         | JOHN                          | Alert                       |            |
| Get in touch   | Name             | JOHN ROBERT ANDERSON          | Reg. Departments            | Constructi |
| Diary          | State            | Current                       | Dept. Questionnaire         | Constructi |
| Shifts         | Available From   |                               | Job Title                   |            |
| Availability   | Personal         | Male 52                       | Key SKills                  |            |
| Requirements   | Home Phone       | 01835 870238                  | CSCS                        | No         |
| CV             | Day Phone        |                               | CSCS Expiry                 |            |
| Questionnaire  | Mobile           | 0776 7073 481                 | Test number for dec pla     |            |
| Notes          | E-mail           | john@iqx.co.uk; vhs@iqx.co.uk | ***Person Q'aire***         |            |
| 2nd Notes      | Payroll Email Ad |                               | Do not mailmerge UN         |            |
|                | Add              | Delete                        | Un-Subscribe from Marketing |            |
|                | Type             |                               | Number                      |            |
|                | E-mail           | john@iqx.co.uk                |                             |            |

To access this feature from a Company Contact - Company - search and select a person or company - Click the Un-Subscribe to Marketing box.

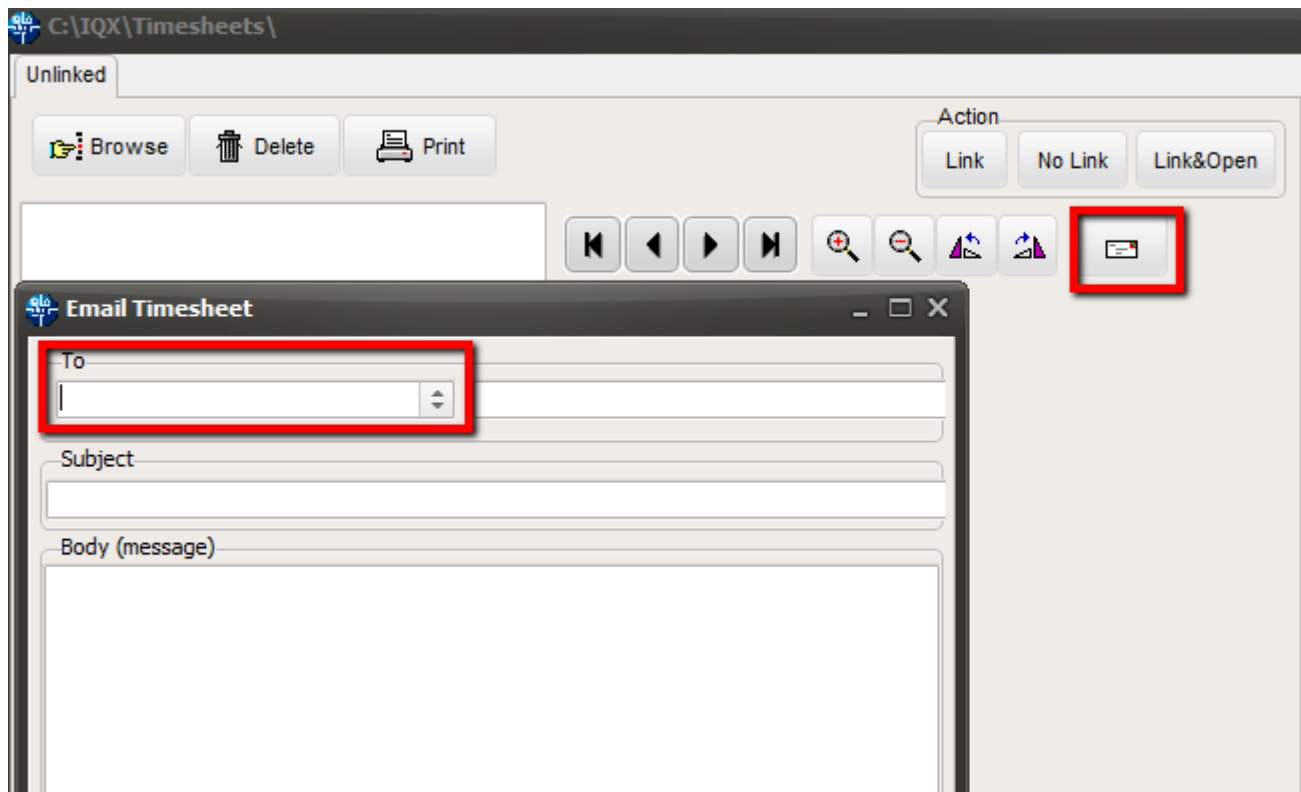


|                |                   |                                       |                           |  |
|----------------|-------------------|---------------------------------------|---------------------------|--|
| Contacts       | Division          |                                       | Contact                   |  |
| Contact Events | Name              | Antenna Audio Ltd.                    | Primary                   |  |
| AWR            | Address           | 85 Great Eastern Street, London, EC2A | Un-Subscribe to Marketing |  |
| AWR Closures   | Web Site          |                                       | Direct Phone              |  |
| Vacancies      | Phone             | 02033658600                           | Mobile                    |  |
| Placements     | Account Code      |                                       | E-mail                    |  |
| Questionnaire  | Invoice Address   |                                       | Direct Fax                |  |
|                | Alert             | Viola test Morgan Spencer             | Job Title                 |  |
|                | State             | Prospect                              | Department                |  |
|                | Current Placement | 0                                     | Note                      |  |

## Accessing Client Email addresses in Timesheet Image Link

When emailing a Timesheet Image, Client Email addresses can be searched or typed into the email box.

To access this feature - Accounts - Timesheet Image Link - Letter Icon - enter or search company email addresses in the To box.



## Converting MS-Office document files into Current CV

MS Office document files ending in .doc and .docx, or of type MSOffice, can now be added and converted into the Current CV within a Person record.

Access this feature by People – Select a person – Documents – Select or Add an MS-Office Document – Click on the Make Current CV button



Thomas Abraham

Temp

Division: BR Derby

Known As: Thomas

Name: Thomas Abraham

State: Placed

Available From: 22/05/2013

Personal: Male 55

Home Phone:

Day Phone:

Mobile: 07932 825096

E-mail:

Payroll Email Ad:

Headline:

Alert:

Reg. Departments: Construction\* (Temp)

Dept. Questionnaire: Construction\*

Job Title: Bricklayer

Key Skills:

CSCS: No

CSCS Expiry:

Test number for dec pla:

\*\*\*Person Q'aire\*\*\*

Do not mailmerge UN:

Expand Add File **Add MS-Office Document** Add Link to File Delete Archive Show All **Make Current CV** Show Details

| Description | Type             | File Type | Publish to Web           | In CV Send               | Defunct |
|-------------|------------------|-----------|--------------------------|--------------------------|---------|
| 3           | JPG              |           | <input type="checkbox"/> | <input type="checkbox"/> | 0       |
| test        | Tax Docum... DOC |           | <input type="checkbox"/> | <input type="checkbox"/> | 0       |

Documents

Compliance

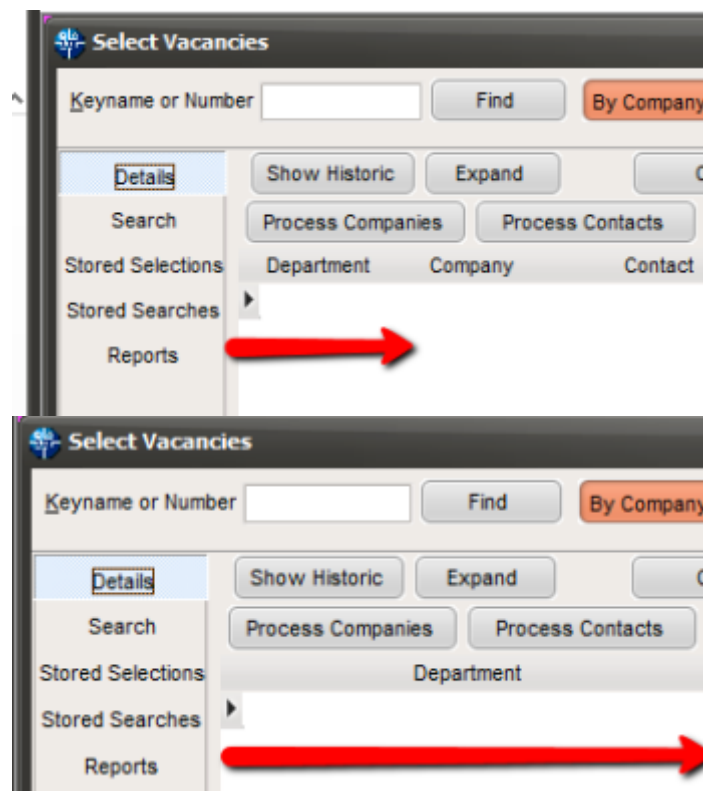
Detail

Equal Opps

## Stretchy Columns

In TempDesk, the columns are now stretchable.

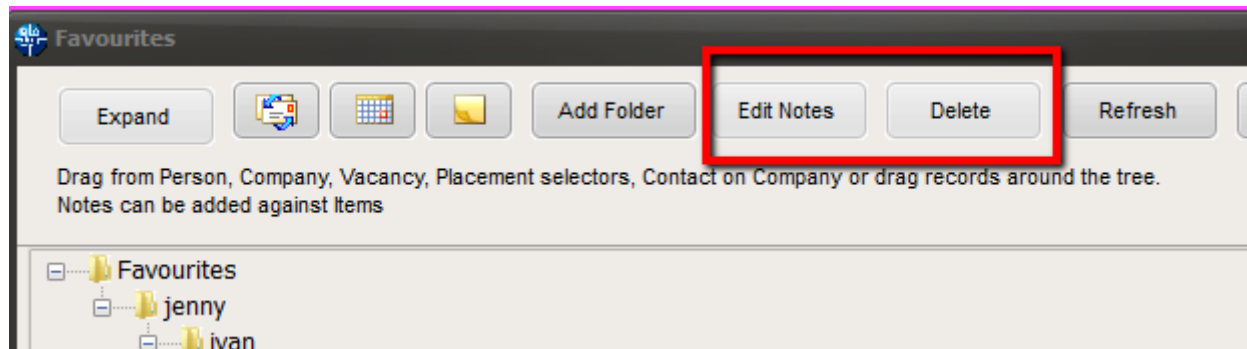
To access the feature - Temp Desk or Vacancy etc. - Find the gap between columns - Hold mouse button down and stretch!



## Editing Notes in Favourites Popup

In the Favourites popup, (the place for making personal lists of contacts/clients), it is possible to Edit Notes and Delete items from within this popup.

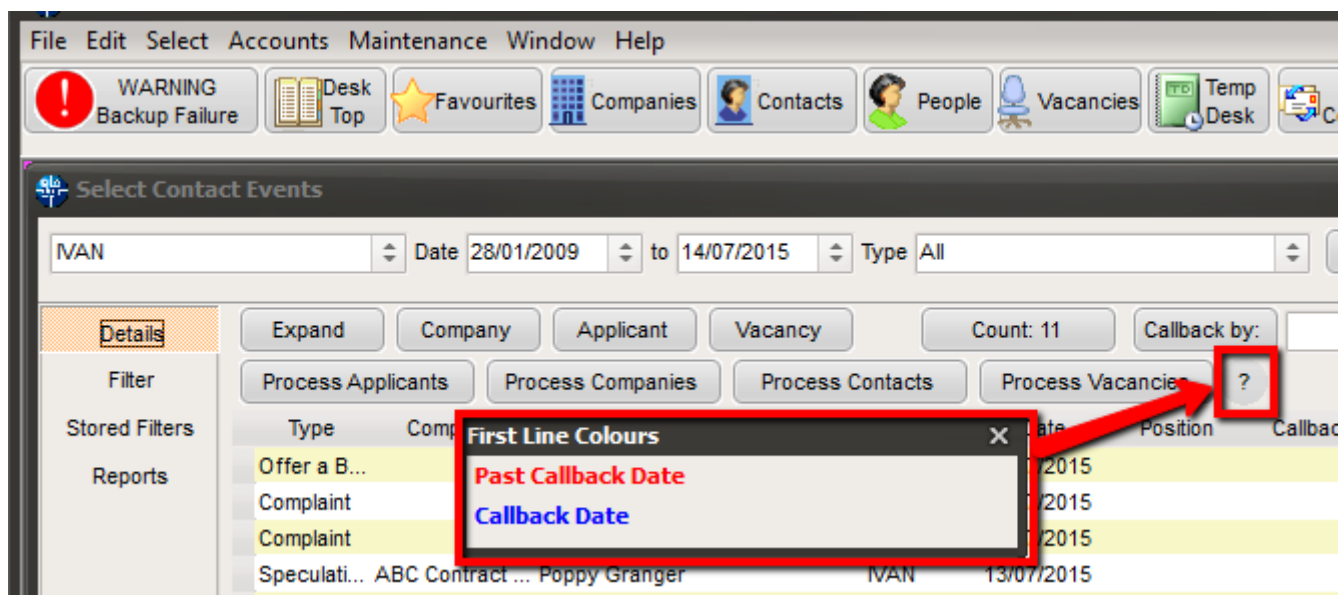
To access this feature – Favourites – Edit Notes or Delete



## Colour Legend included in Contact Events

A Colour Legend to explain the use of font colours has been added to Contact Event Selector, Person and Company Contact Events.

To access this feature – Contact Events Selector (not Make Contact Event) – Click '?' OR People or Company – Select Company or Person – Click '?'





## Blocking E-Timesheets

This feature offers the option to block creation of E-Timesheets by vacancy where the client does not want timesheets filled in online.

To access this feature - Vacancies - Search and Select a vacancy - Miscellaneous - Scroll down - Block E-Timesheets

The screenshot shows a sidebar menu on the left with 'Miscellaneous' selected. The main area displays various settings for a vacancy, including 'Source' (Existing Client), 'Reason Not Filled', 'Payroll Co.' (1), 'Analysis Code' (E4), 'Currency' (Pounds Sterling), 'Cascade Time', 'Cascade Level' (0), 'External Price List', 'Send Shifts To Payroll' (unchecked), 'Override Invoice Layout', 'AWR Fixed NI percent', and 'AWR Fixed WTR percent'. The 'Block E-Timesheets' checkbox is highlighted with a red box and is currently unchecked.

This Feature requires setting up by a System Administrator at Maintenance - General Settings - Group 'Tems' - Y against No 330 - Click the Save and Close button.

## Accounts

### Sorting by Charge Amount and Contract

Invoice Temporary Timesheets can now be sorted by Charge Amount and Contract Ref to allow all credit notes to be seen together.

Access to this feature - Accounts - Invoice Temp Timesheets

The screenshot shows the 'Invoice Temp Timesheets' interface. It includes filters for Account, Division, Desk, IM Group, Timesheet Grouping, Invoice Date, and Frequency. A table of timesheets is displayed below. The 'Contract Ref Charge' column is highlighted with a red box.

| Period | Timesheet | Account Code | Client          | Payroll No. | Temp          | Position | PO Number | Contract Ref | Charge | Select                   | Attn. of   |
|--------|-----------|--------------|-----------------|-------------|---------------|----------|-----------|--------------|--------|--------------------------|------------|
| 201124 | 2516      | ABBA01       | ABBA Ltd        | NEW         | Maria Almeida | test     |           |              | 180.0  | <input type="checkbox"/> | Accounts C |
| 201124 | V2536     | AWRLINKED    | AWR LK2 Applies | NEW         | Sally Jones   | PA       |           |              | 135.00 | <input type="checkbox"/> | Accounts C |



# System Administrator

## Optimising Shift Matching Speed

The underlying code has been altered to optimise the time taken to carry out Shift Matching.

## Timesheet Image Link

A user without Accounts rights can be set up to use “Link Timesheet Images” providing the facility to link timesheets to image files.

Access this feature – Accounts – Timesheet Image Link.

| Group | Role                                | Search Criteria Group Assigned      | Expires | Notes                     |
|-------|-------------------------------------|-------------------------------------|---------|---------------------------|
| TEMP  | Can over-ride Temp Pay Rates        | <input checked="" type="checkbox"/> |         |                           |
| TEMP  | Can over-ride Temp Charge Ra...     | <input checked="" type="checkbox"/> |         |                           |
| TEMP  | Can add/edit lines on complete...   | <input checked="" type="checkbox"/> |         |                           |
| TEMP  | Filter shift templates allowed b... | <input checked="" type="checkbox"/> |         | Displays list of possi... |
| TEMP  | Show Advanced Hydra Transf...       | <input checked="" type="checkbox"/> |         | Only applies to Hydr...   |
| TEMP  | Can Edit Emp Contract & Exp B...    | <input checked="" type="checkbox"/> |         | Only applies to the o...  |
| TEMP  | Can Enter Holiday Pay Timeshe...    | <input checked="" type="checkbox"/> |         | Must not have Hide ...    |
| TEMP  | Not Current Temps                   | <input checked="" type="checkbox"/> |         | If on the Person Sele...  |
| TEMP  | Can process person-based Ti...      | <input checked="" type="checkbox"/> |         | Requires Person-ba...     |
| TEMP  | Can link Timesheet Images           | <input type="checkbox"/>            |         | Does not allow times...   |
| TEMP  | Pre-select current state on re...   | <input checked="" type="checkbox"/> |         |                           |

System Administrator configuration required – Maintenance – Users – Select a User – Expand – Role Group ‘TEMP’

## Search Hints

Some newer users had forgotten or been unaware of the different search criteria shown in the search screen. Therefore the hints function has been set on. The text can be permanently hidden through User Layout Settings.

To switch off this feature - Maintenance – Users – Select Users – layout settings – Search on ‘hints’ – Click the Hide Search Criteria Hints button.



| Group | Setting                    | Active                   | Expires | Notes                     |
|-------|----------------------------|--------------------------|---------|---------------------------|
| USER  | Hide Search Criteria Hints | <input type="checkbox"/> |         | If false displays hints d |

## Adding more personalisation to Boiler Plate Text

This feature allows SMS and Emails to be personalised using Boiler Plate Text. For example a Salutation can be added to Shift Details texted to a candidate. See below for an example. However, the number of characters is still limited to 160 so this must be considered when creating Boiler Plate Text.

To configure this feature - Maintenance - Agency Setup - Boiler Plate Text - New Boiler Plate Text can be added here. Users can access the Boiler Plate Text in the usual way.

| Document Templates  | Applicant 2  | Reference - Verbal       | 10  | Company:                               |
|---------------------|--------------|--------------------------|-----|----------------------------------------|
| Document Types      | Company      | Sample Boiler Plate Text | 10  | Sample Boiler Plate Text               |
| Phone Types         | Progress     | Sample Boiler Plate Text | 10  | Sample Boiler Plate Text               |
| Boiler Plate Text   | Text Message | Available?               | 10  | Are you available for {SHIFTDETAIL...} |
| E-mail Signatures   | Text Message | Confirm?                 | 12  | {APP_SALUTATION} Please confirm...     |
| Contact Event Types | Text Message | Testing Principle        | 100 | Testing message {SHIFTDETAILS}         |

## Setting up additional questions in Applicant Questionnaire but not for display elsewhere

Questions on the applicant questionnaire that have been previously set up and identified in the -2000 group will appear at the end of the general questionnaire and no-where else, e.g. for equality questions which are for monitoring purposes but not display in the candidate details.

This feature needs to be configured by your System Administrator. Set-up - Maintenance - Questionnaire - Applicant Questionnaire - See below for an example:



**Questionnaire Maintenance**

**Applicant Questionnaire**

**Questions**

| Order | Question ID | Question Description         | Type               | Min Step Size | Units | Required                 | Group | Audit                    | Web Publish              |
|-------|-------------|------------------------------|--------------------|---------------|-------|--------------------------|-------|--------------------------|--------------------------|
| 501   | T01         | Print or Email Timesheets    | Single Selection   |               |       | <input type="checkbox"/> | -10   | <input type="checkbox"/> | <input type="checkbox"/> |
| 502   | T02         | Payslip Email Address        | Text               |               |       | <input type="checkbox"/> | -10   | <input type="checkbox"/> | <input type="checkbox"/> |
| 503   | T03         | Normal Hours Worked          | Single Selection   |               |       | <input type="checkbox"/> | -10   | <input type="checkbox"/> | <input type="checkbox"/> |
| 504   | T04         | Irregular Employment Pattern | Single Selection   |               |       | <input type="checkbox"/> | -10   | <input type="checkbox"/> | <input type="checkbox"/> |
| 505   | T05         | Starter Declaration          | Single Selection   |               |       | <input type="checkbox"/> | -10   | <input type="checkbox"/> | <input type="checkbox"/> |
| 130   | TOE         | TOE Received Date            | Date               |               |       | <input type="checkbox"/> | -220  | <input type="checkbox"/> | <input type="checkbox"/> |
| 420   | TR1         | Training Courses             | Multiple Selection |               |       | <input type="checkbox"/> | -240  | <input type="checkbox"/> | <input type="checkbox"/> |
| 2     | TST         | Test number for dec places   | Numeric            | 0.01          |       | <input type="checkbox"/> | 0     | <input type="checkbox"/> | <input type="checkbox"/> |
| 340   | VE          | Visa Expiry                  | Date               |               |       | <input type="checkbox"/> | -230  | <input type="checkbox"/> | <input type="checkbox"/> |
| 330   | VS          | VISA Type                    | Single Selection   |               |       | <input type="checkbox"/> | -230  | <input type="checkbox"/> | <input type="checkbox"/> |
| *     | 965         | ABC Equality Monitoring      | Multiple Selection |               |       | <input type="checkbox"/> | -2000 | <input type="checkbox"/> | <input type="checkbox"/> |

**Choices**    **Sub C**

## Additional Audit feature

Person - Employment Period - Start Date is now audited and will appear on the Audit Trail.

To configure the Auditing - Maintenance - Database setup - Audit Items - Search '%start%' - Click the Employment Start Date box



Temp Division **BR Derby** Headline

Perm Known As Roberta Alert

**Accounts** Name Roberta Azadian Reg. Departments Construction (Temp)

Contact Events State Secondary Agency Dept. Questionnaire Construction

Payroll Available From Job Title

Payroll Address Personal Female Key Skills

Timesheets Home Phone 0131 531 2757 CSCS No

Placements Day Phone CSCS Expiry

Notes E-mail Test number for dec pla

2nd Notes Payroll Email Adc \*\*\*Person Q'aire\*\*\*

Documents Social Media Do not mailmerge UN

STi Worker Eng Address 41 Boswall Terrace, EDINBURGH, E Location Zone Any Area

Employment Consultant VHS Emergency Contact D

Periods Registered No. 10028 Driving Licence Full, Clean

Export Date 10/11/2009 17:25 E Pay Model

**Audit Trail** Pack Dist

| Description                              | When             | Login Name | Old values | New values |
|------------------------------------------|------------------|------------|------------|------------|
| Employment Start Date Updated - Rober... | 14/07/2015 13:01 | IVAN       | 1999-10-13 | 2006-10-13 |
| Employment End Date Updated - Rober...   | 14/07/2015 13:01 | IVAN       | 2013-04-12 | 2011-04-12 |
| Employment End Date Updated - Rober...   | 14/07/2015 12:50 | IVAN       | 2009-04-12 | 2015-04-12 |

To Access this feature - Select a client from temp Desk or People - Accounts (side bar) - Audit Trail

**Maintenance - Database Setup**

Save And Close Abandon Update

Dictionary of Searchable Data Items Area All **%start%** Search

Custom Word Merge Fields

**Audit Items**

| Area            | Item                  | Audit                               |
|-----------------|-----------------------|-------------------------------------|
| Company Contact | Start Date            | <input type="checkbox"/>            |
| Person          | Employment Start Date | <input checked="" type="checkbox"/> |
| Placement       | Placement Start Date  | <input checked="" type="checkbox"/> |

Index Server

License

Job Runner Schedule Groups

Job Runner Schedules

From:  
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Last update: 2017/11/16 22:08

