



Release 2.3.4

Features

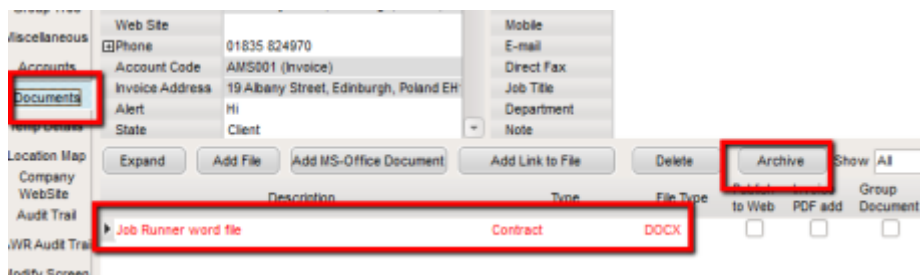
Users

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.

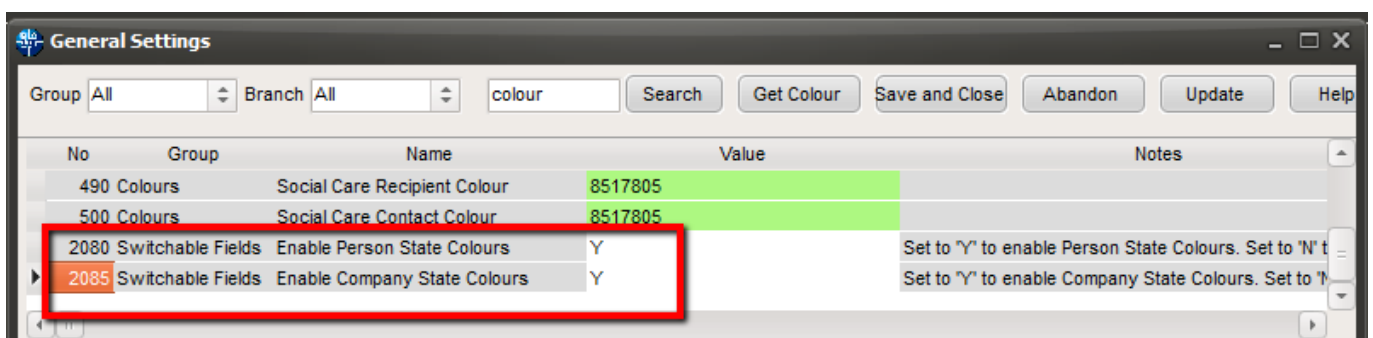
To access this feature from any view – Documents – Select a file – Use the Archive button



Alternative Form Background Colour

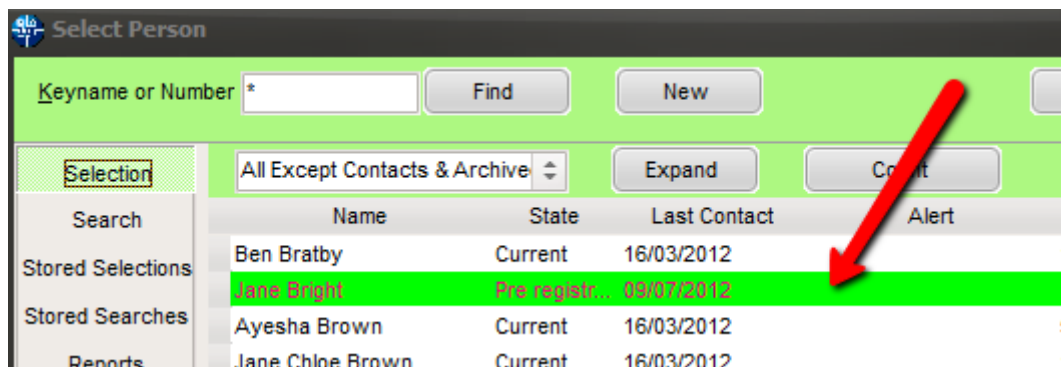
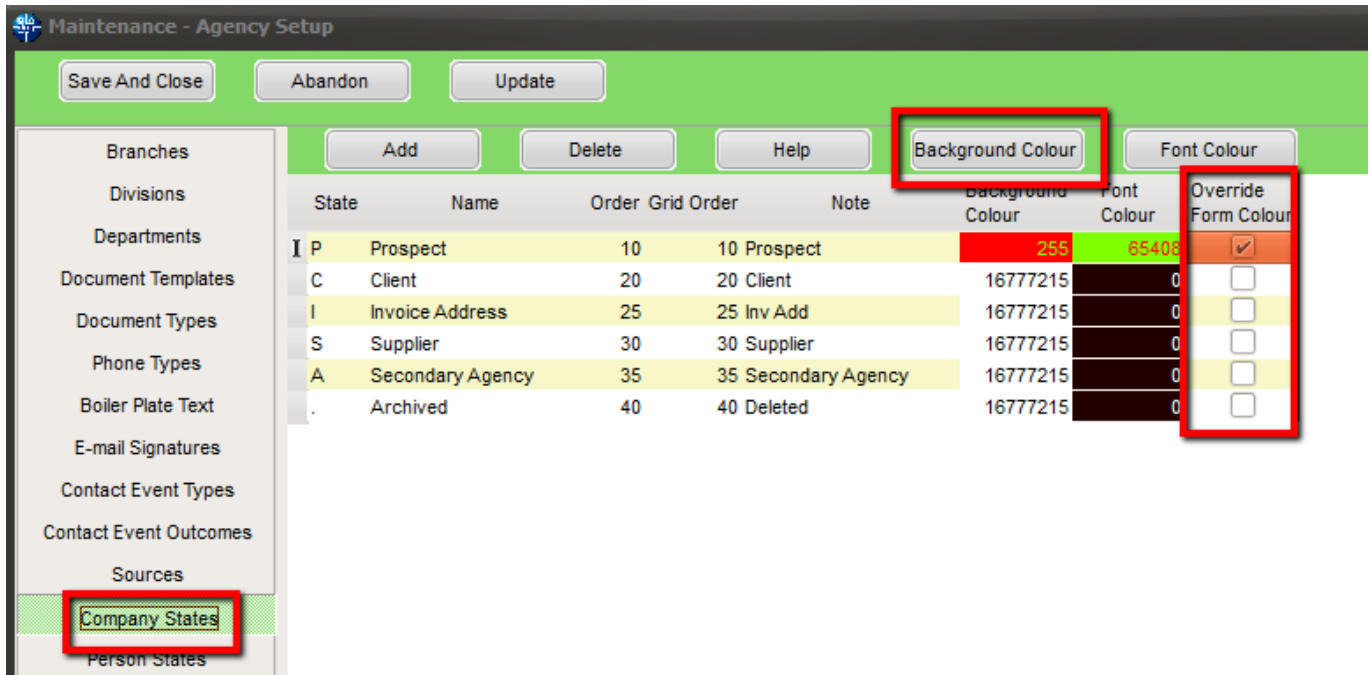
This feature allows the Company or Person form colour to be changed according to the record state.

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.



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.

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...	☐	☐	16777215	0	☐
P	Placed	2	2	Placed	☐	☐	16777215	0	☐
L	Client	3	3	Client	☐	☐	16777215	0	☐
I	Pre registration	4	4	Added - not enough de...	☐	☐	6388863	4259834	☒
D	Not Active	6	6	Deleted	☐	☐	16777215	0	☐
A	Secondary Agency	10	10	Secondary Agency Temp	☐	☐	16777215	0	☐
N	Client/Candidate	11	11	ljkh	☐	☐	16777215	0	☐
Z	Umbrella	20	20	Umbrella improt tests	☐	☐	16777215	0	☐
.	Archived/DNU	99	99	Deleted	☐	☐	16777215	0	☐

Selection	Name	State	Last Contact	Alert
Ben Bratby	Current	16/03/2012	1627 Cu	
Jane Bright	Pre registr...	09/07/2012		
Ayesha Brown	Current	16/03/2012	56 Ivanh	
Jane Chloe Brown	Current	16/03/2012	1 Carrut	

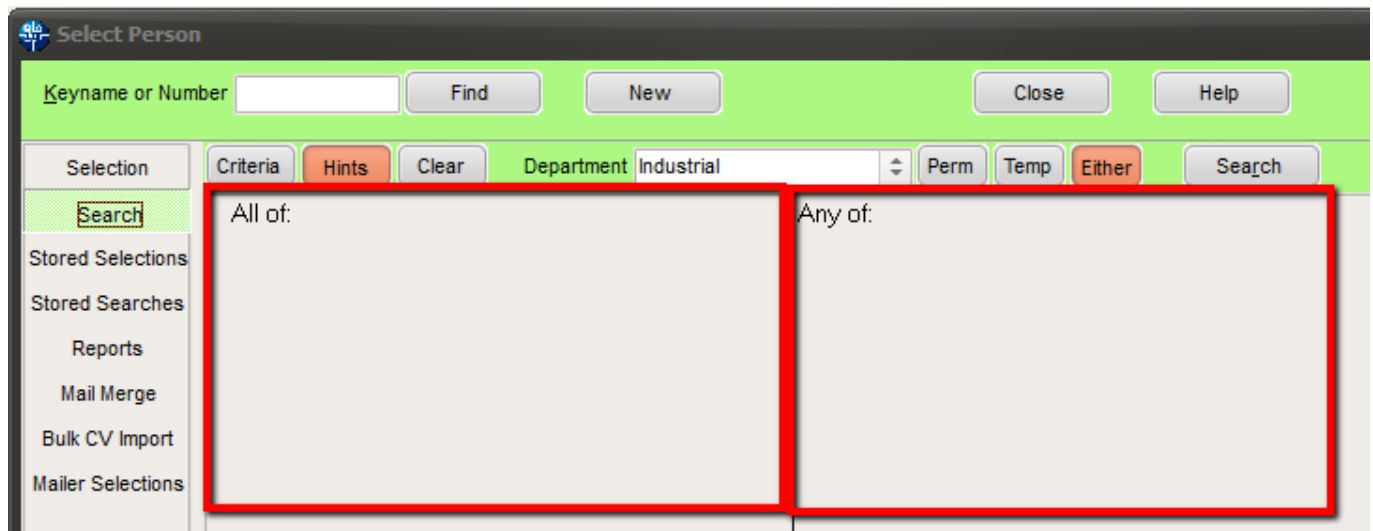
Search Hints

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.

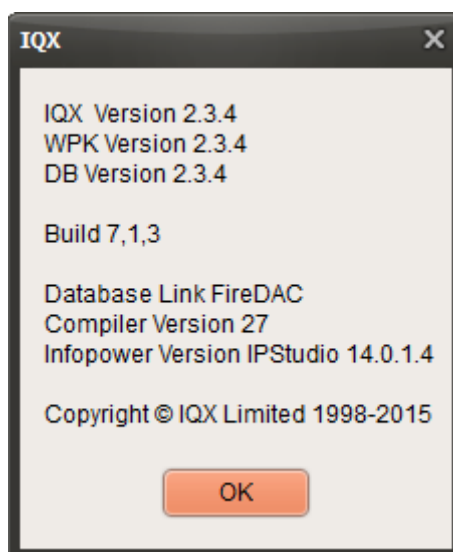
To access this feature - People - Search



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.

The screenshot shows a user interface for managing contacts. On the left, a sidebar contains buttons: Temp, Contact Events, Get in touch (highlighted with a green box), Diary, Shifts, Availability, Requirements, CV, Questionnaire, Notes, and 2nd Notes. The main area displays details for a contact named JOHN ROBERT ANDERSON, including their division (BR Derby), known as (JOHN), state (Current), and various contact details like home, day, and mobile phone numbers, as well as email addresses. On the right, there are sections for 'Headline', 'Alert', 'Reg. Departments', 'Dept. Questionnaire', 'Job Title', 'Key Skills', 'CSCS', 'CSCS Expiry', 'Test number for dec pla', and '***Person Q'aire***'. At the bottom, there are buttons for 'Add', 'Delete', and 'Un-Subscribe from Marketing' (highlighted with a red box). Below these buttons, there is a section for 'E-mail' with the address john@iqx.co.uk.

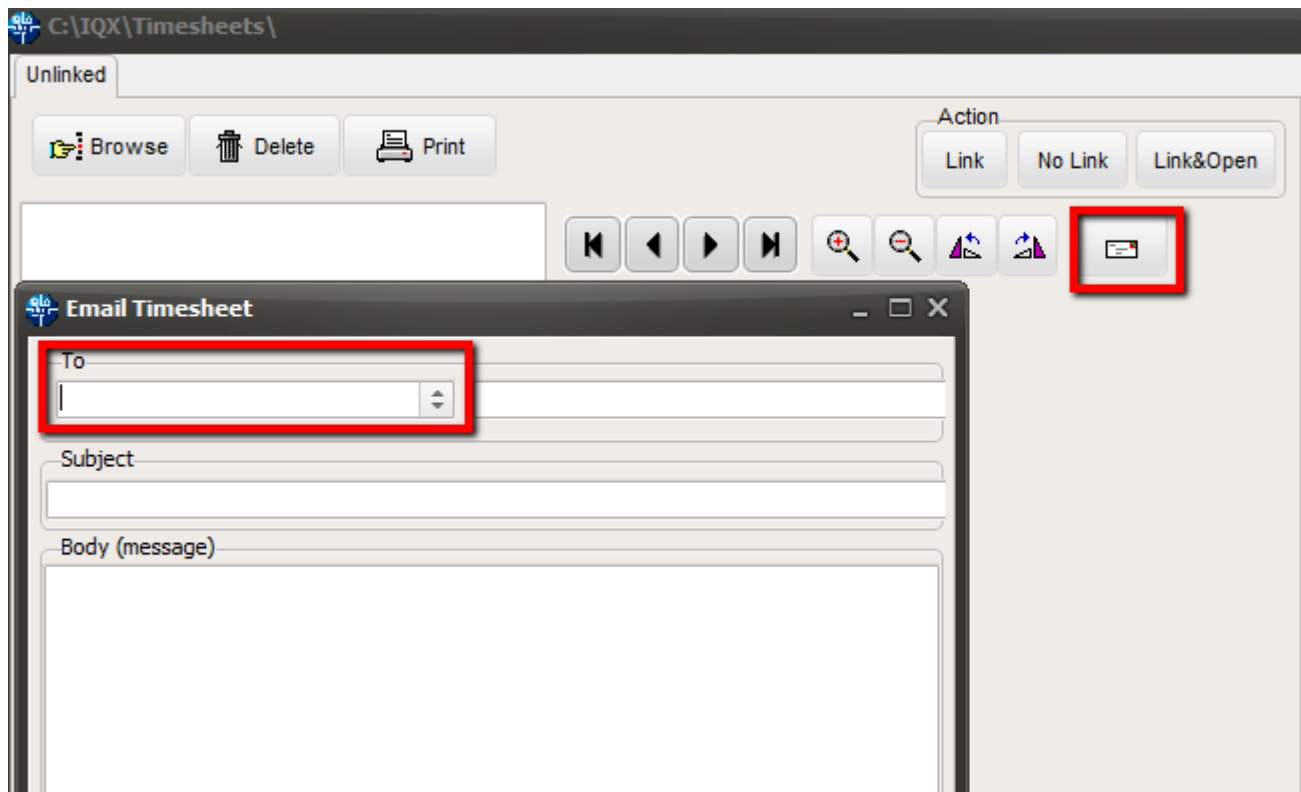
To access this feature from a Company Contact - Company - search and select a person or company - Click the Un-Subscribe to Marketing box.

The screenshot shows a user interface for managing company contacts. On the left, a sidebar contains buttons: Contacts, Contact Events, AWR, AWR Closures, Vacancies, Placements, and Questionnaire. The main area displays details for a company contact named Antenna Audio Ltd., including their division, address (85 Great Eastern Street, London, EC2A), web site, phone number, account code, invoice address, alert (Viola test Morgan Spencer), state (Prospect), and current placement (0). On the right, there is a section for 'Contact' with fields for Primary, Direct Phone, Mobile, E-mail, Direct Fax, Job Title, Department, and Note. The 'Un-Subscribe to Marketing' button is highlighted with a red box.

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		☐	☐	0
test	Tax Docum...	DOC	☐	☐	0

Documents

Compliance

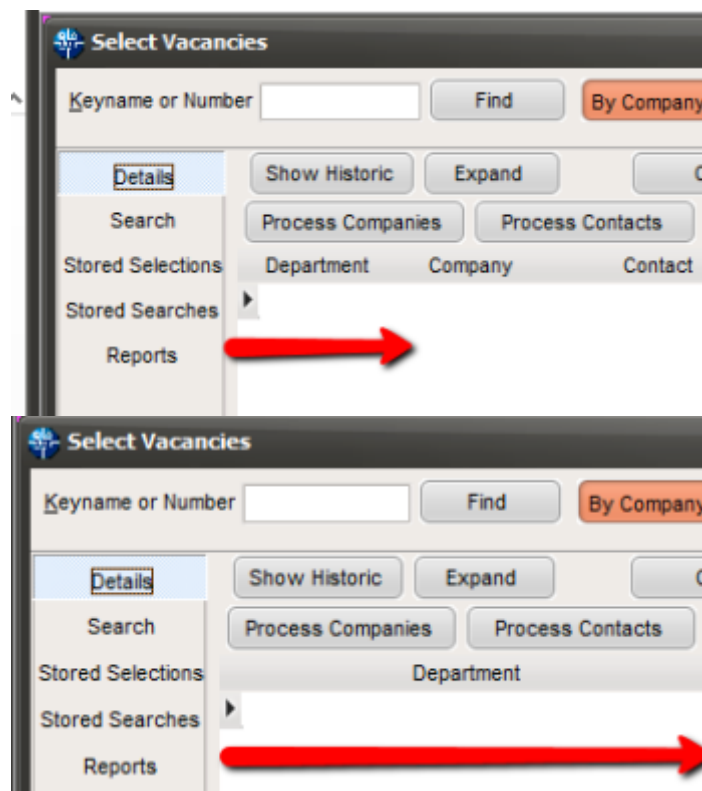
Detail

Equal Opps

Stretchy Columns

In TempDesk, the columns are now stretchable.

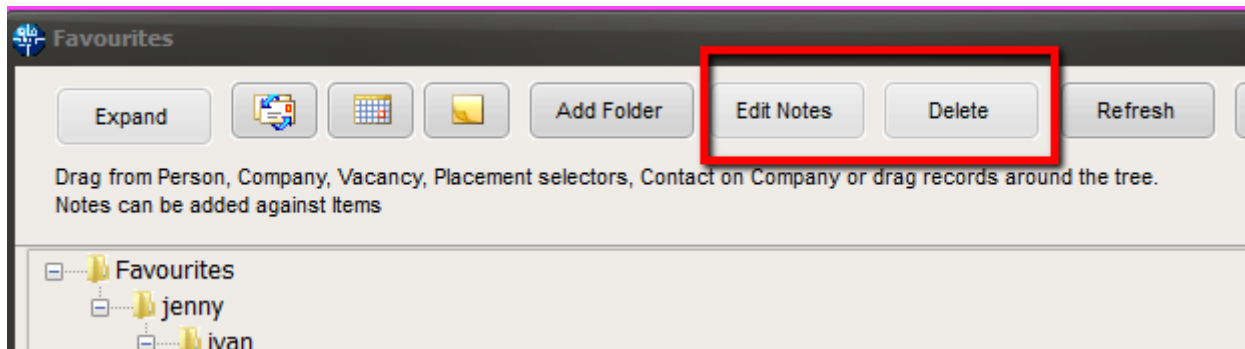
To access the feature - Temp Desk or Vacancy etc. - Find the gap between columns - Hold mouse button down and stretch!



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.

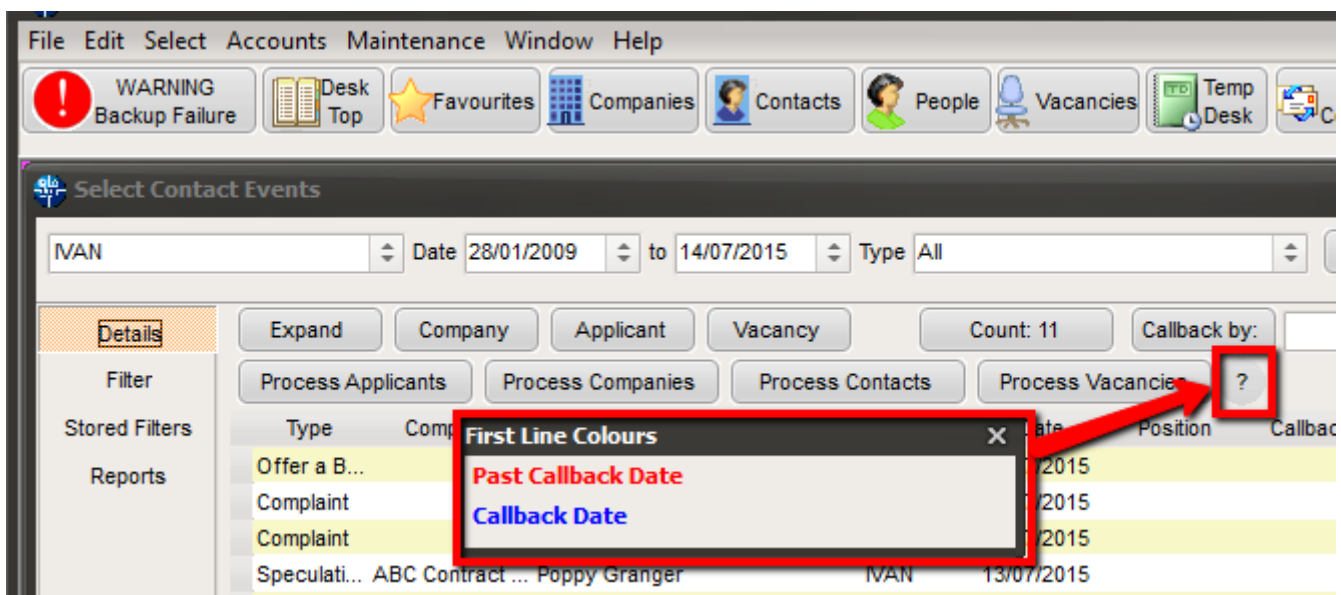
To access this feature – Favourites – Edit Notes or Delete



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	☐	Accounts C
201124	V2536	AWRLINKED	AWR LK2 Applies	NEW	Sally Jones	PA			135.00	☐	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.

Template for New Users

Not In Use

Report View Level

Report Print Level

999

999

Role Group

TEMP

Search

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

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.



Roles	Name	Branch
Layout Settings	Ivan Baldwin	
Questionnaire	Keyname	BALDWIN IVAN
Division Access	Login Name	IVAN
Department	Job Title	
Maintenance	E-Mail Address	ivan@iqx.co.uk
Popup Escalations	Short ID	PI
Synety Setup	Template for New Users	☐
Audit Trail	Not In Use	☐
Own Audit Trail	hints	Search

Group	Setting	Expires	Notes
USER	Hide Search Criteria Hints	☐	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 {SHIFTDETAILS}...
E-mail Signatures	Text Message	Confirm?	12 {APP_SALUTATION} Please confirm...
Contact Event Types	Text Message	Testing Principle	100 Testing message {SHIFTDETAILS}
Contact Event Outcomes			
Sources			
Company States			

Boiler Plate Text
{APP_SALUTATION} Please confirm re {SHIFTDETAILS}? Ring 01835 340034

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			☐	-10	☐	☐
502	T02	Payslip Email Address	Text			☐	-10	☐	☐
503	T03	Normal Hours Worked	Single Selection			☐	-10	☐	☐
504	T04	Irregular Employment Pattern	Single Selection			☐	-10	☐	☐
505	T05	Starter Declaration	Single Selection			☐	-10	☐	☐
130	TOE	TOE Received Date	Date			☐	-220	☐	☐
420	TR1	Training Courses	Multiple Selection			☐	-240	☐	☐
2	TST	Test number for dec places	Numeric	0.01		☐	0	☐	☐
340	VE	Visa Expiry	Date			☐	-230	☐	☐
330	VS	VISA Type	Single Selection			☐	-230	☐	☐
*	965	ABC Equality Monitoring	Multiple Selection			☐	-2000	☐	☐

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	☐
Person	Employment Start Date	☒
Placement	Placement Start Date	☒

Index Server

License

Job Runner Schedule Groups

Job Runner Schedules

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