



Release 2.3.5

Note: 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

Users

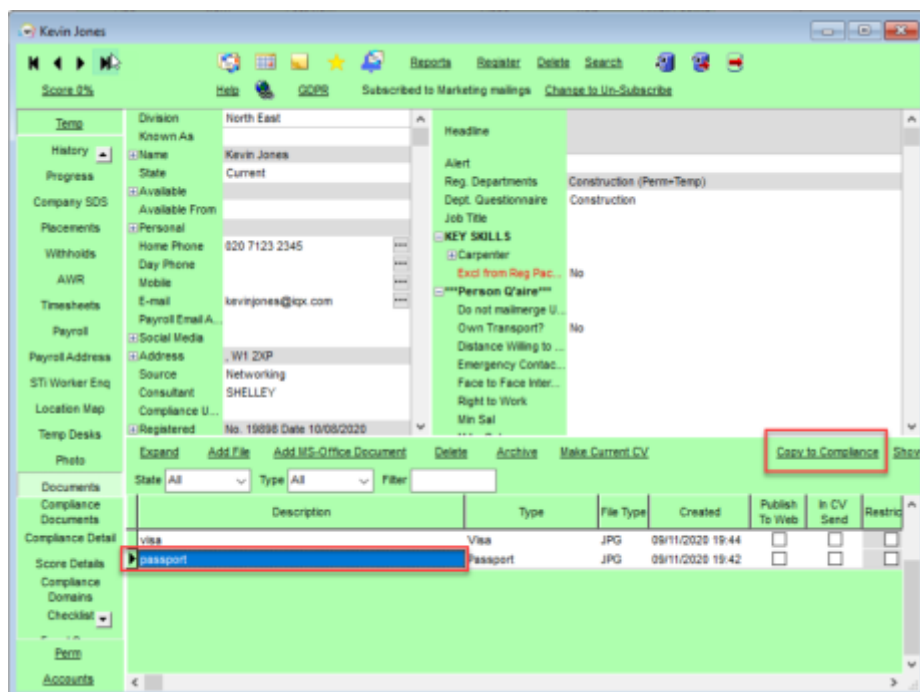
Separation of Compliance Docs and Docs

This feature separates out Compliance Documents by document type.

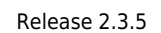
To access this feature in the Person form, scroll down the sidebar.

Compliance documents can be created in:-

Person form – Documents – Select document – Copy to Compliance OR Drag a document into Compliance Documents. Select all or part of the document – Save Compliance – Select Document Type – Complete Compliance document questionnaire.



Compliance documents are saved as pdf documents. A pdf copy of the compliance document will be saved in Compliance Documents.



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



requirements.

Enhancement to Withhold from Group to clarify which are not employments

If a company is in a group and the Withhold button, on the History view, is used there is an option to Withhold from Group. If this is accepted the group companies are listed in the employment with the job title 'For Withhold from Group'.

Kieran Considine

Help Registration Report

Temp

Personal Male 27

Home Phone 01835 9013472

Day Phone

Mobile 07453900090

E-mail

Payroll Email Ad

Social Media

Address 101 Varley Street, Gretna, CV34 5YE

Consultant VHS

Registered No. 10056 Date 29/09/2008

Last Updated 15/11/2015 14:24

Headline

Alert

Reg. Departments Construction* (Temp), Industrial (Perm+Temp)

Dept. Questionnaire Construction*

Job Title

Key Skills

CSCS No

CSCS Expiry

Test number for dec plac

Person Q'aire

Do not mailmerge UN

Location Zone Any Area

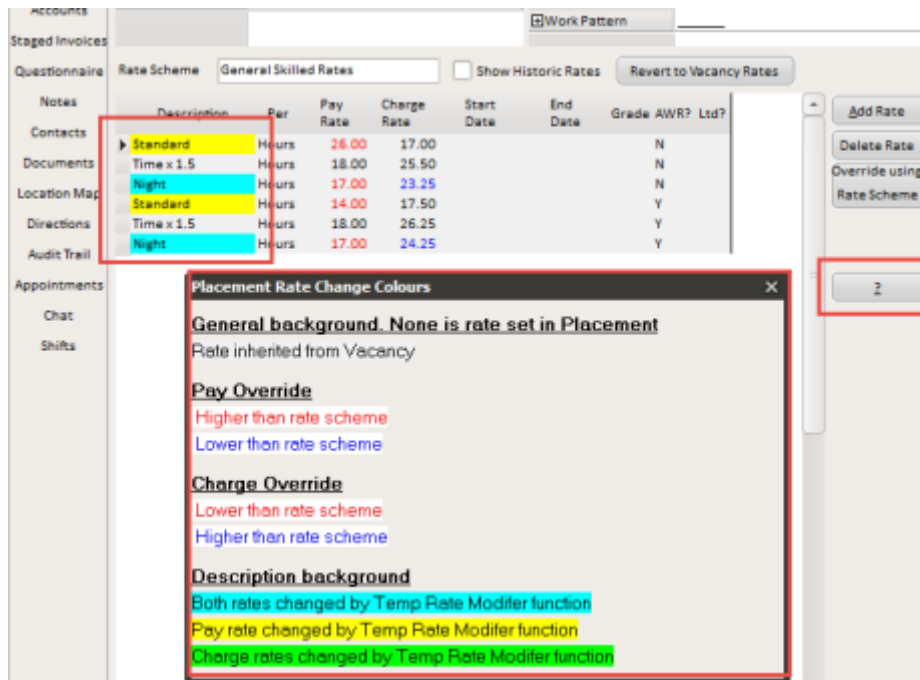
Company Expand Add Employment Delete Employment Make Internal Withhold Process Companies

Company	Job Title	Temp	External	From	To	Salary	Concurrent	By Us
AWR Applies TEST CHANGE	ASA Shift Test	☒	☐	22/11/2011	06/12/2011		☒	☒
AWR LEAGGS School	Advanced Cover Supervisor	☒	☐	03/12/2011	03/12/2011		☒	☒
AWR Private School	Big Cover Supervisor	☒	☐	24/11/2011	24/11/2011		☒	☒
AWR Private School	Big Cover Supervisor	☒	☐	01/12/2011	01/12/2011		☒	☒
AWR Private School	Big Cover Supervisor	☒	☐	08/12/2011	08/12/2011		☒	☒
Faculty of Public Health Medic...	For Withhold from Group	☒	☐				☒	☐

Placement Rate Colour Legend to highlight TempRate Modifier has been used

A Placement Rate Colour legend has been added to highlight when TempRate Modifier has been used.

Access this feature on a Placement - Rates view - Question mark button.

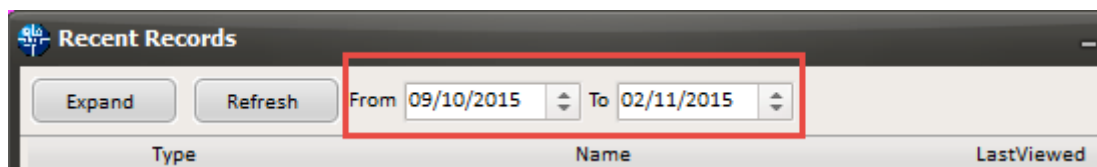


The screenshot shows the 'General Skilled Rates' table with columns: Description, Par, Pay Rate, Charge Rate, Start Date, End Date, Grade AWR?, and Ltd?. The table contains several rows with different rate descriptions and values. A red box highlights the 'Standard' and 'Night' rows. A dialog box titled 'Placement Rate Change Colours' is open, showing options for 'General background', 'Pay Override', 'Charge Override', and 'Description background'. The dialog box has a red border and a close button. A red box also highlights the '2' button on the right side of the interface.

Recent Records be able to look via a date range

Recent Records have been enhanced to allow searching between a date ranges.

To access this feature Press Ctrl + F2 **or** Select - Recent Records and insert the date range under consideration.



The screenshot shows the 'Recent Records' dialog box with a red box highlighting the date range filter. The filter is set to 'From 09/10/2015' and 'To 02/11/2015'. The dialog box also has 'Expand' and 'Refresh' buttons. Below the filter, there are columns for 'Type', 'Name', and 'LastViewed'.

Boilerplate menu list size switch

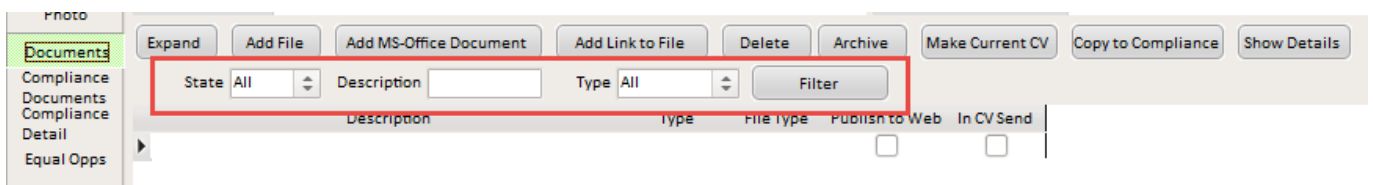
A switch has been inserted to the boiler plate menu column so they do not stretch beyond the screen.

This feature will require System Administrator setup.

Documents: adding, archiving and managing

In Person, Placement, Company, Vacancy and Progress filtering has been added to the document view.

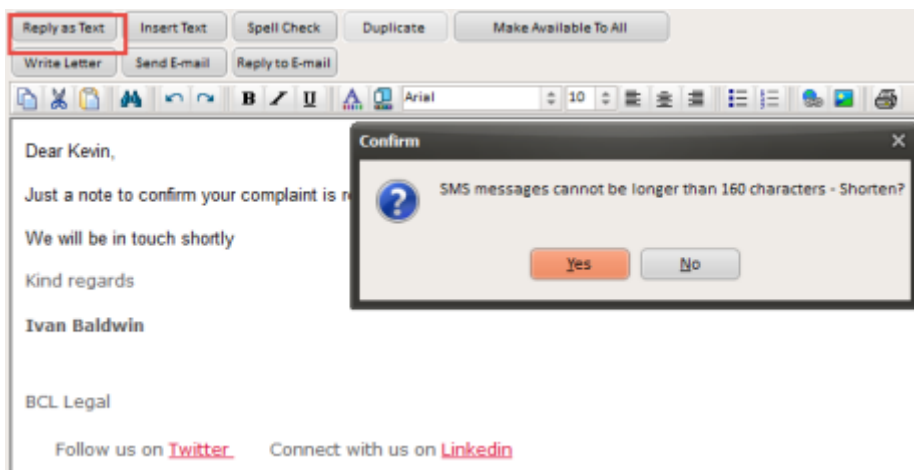
This feature allows searching and filtering of Document State and Type along with key word searching in the description.



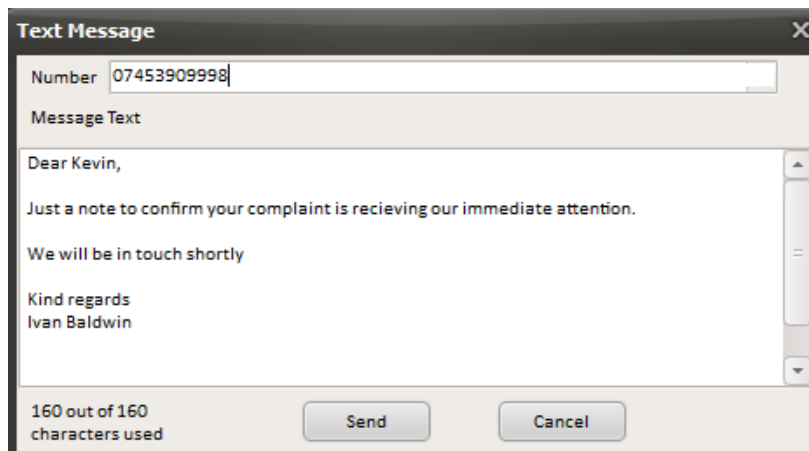
In addition, the sort order has been amended to place any archived records at the bottom of the list.

HTML Email - Plain Text Reply Method

An option to reply to an HTML email in a plain text SMS message.



When replying to an HTML email, write or insert text and then use the Reply as Text button to send the text as plain text. The Contact Event will be saved as HTML.



Add to Diary List Option to Multiselect and Delete

This feature enables multi-selecting and deletion in Diary List. To use this feature - Desktop - Diary List - Highlight the entries to be deleted using the mouse and the Ctrl key - Delete - Confirm.



The screenshot shows the 'Desk Top' application window. On the left is a sidebar with navigation options: 'Daily Work List', 'Diary', 'Diary List' (highlighted), 'Inbox', 'Progress due for Action', and 'Interview'. The main area displays a table of work entries with columns: Date, Time, Consultant, Popup, Description, Type, Applicant, Company, Pr'ty, and Entered. The table contains several rows of data for dates around 14/09/15. At the top right of the main area, there are buttons: 'Update', 'Save and Close', 'Abandon', 'Help', and 'Delete' (highlighted with a red box). Above the table, there are date filters: 'Date From' (26/12/1988) and 'Date To' (15/11/2015), along with buttons for 'Expand', 'Applicant', 'Company', 'Vacancy', and 'Delete'.

This feature requires System Administrator setup.

Show Site Name on completed Timesheet

The ability to show the site name on a completed timesheet has been added.

Once there is a completed timesheet, select a timesheet, it will show in the References section.

The screenshot shows the 'Details' section of a timesheet form. The form has a sidebar with options: 'Details' (selected), 'Shifts', 'Linked Timesheets', and 'Questionnaire'. The main area displays the following fields: Client (510 3I Group PLC), Job Title (Operator), References (PO Number00578 Site. test, highlighted with a red box), Timesheet Number (V2068), Period (W 201532), Dates (From 02/11/2015 to 08/11/2015), Payroll Company (1), and Analysis Code (E3). At the top of the form, there are buttons: 'Delete', 'Do Not Transfer', 'New Timesheet', and 'Help'.

Add Period Filter to Timesheet View - as in Vacancy Timesheet View

The facility to filter timesheets by period in Vacancy has been extended to filtering timesheets in Person. This reduces the time for the form to load.

View this feature via the Person form - Timesheets - The 'Show from Period' box defaults to showing the last 10 weeks. To see more enter the starting week and Apply. Display will change to show only those timesheets from that period.



Kevin Constance

Temp

Division: BR Derby

Known As: Kevin

Name: Kevin Constance

State: Current

Available From:

Personal: Male 27

Home Phone: 01835 9013472

Day Phone:

Mobile: 07453900090

E-mail:

Payroll Email Address:

Social Media:

Headline:

Alert:

Reg. Departments: Construction* (Temp), Industrial (Perm+Temp)

Dept. Questionnaire: Construction*

Job Title:

Key Skills:

CSCS:

CSCS Expiry:

Test number for dec plac:

Person Q'aire

Do not mailmerge UN:

Location Zone: Any Area

Expand Add Self-Book Holiday Pay Query Create Show from Period: 201523 Apply

Period Number Company Position Gross Pay Net Charge

This functionality requires System Administrator setup.

IQXWeb

Visibility of a Person Record being registered as an IQXWeb User

This feature identifies Candidates and Contacts who are enabled to use IQXWeb.

View this feature by selecting a Person or Contact and finding the IQXWeb icon. A red tick indicates the Person or Contact is an active IQXWeb user.



System Administrator

Audit Trail side bar button location moved to bottom of list in the Person form

In Person records the Audit Trail side bar button has been moved to the bottom of the list.

Visibility of this button can be set up via Maintenance - Users - Roles - Role Group SUPERUSER - Can see Audit Views without Tech Support Role



Group	Role	Search Criteria	Group Assigned
SUPERUSER	Can edit the Division field of a Person or Compa...		☒
SUPERUSER	Can drag-merge Company or Person records		☒
SUPERUSER	Can move Contact without Maintenance Role		☒
SUPERUSER	Can use Document Templates from all branches		☒
SUPERUSER	Can make Contact Events available to all users		☒
SUPERUSER	Can see Audit Views without Tech Support Role		☒

and Maintenance - Users - Layout Settings - Role Group - General - Can edit own screen layout.

Group	Setting	Active	Expires	Notes
GENERAL	Can edit own screen layout	☒		Allows user to hide s...
USER	Hide All Appointments view	☐		Applies to Person, Co...
USER	Hide All Holiday Pay Buttons	☐		To enter timesheets r...

This feature can be viewed via the Person form - Scroll down the side bar to the bottom of the list.

Add Period Filter to Timesheet View - as in Vacancy Timesheet View

The facility to filter timesheets by period in Vacancy has been extended to filtering timesheets in Person. This reduces the time for the form to load.

View this feature via the Person form - Timesheets - The 'Show from Period' box defaults to showing the last 10 weeks. To see more enter the starting week and Apply. Display will change to show only those timesheets from that period.

To set this up:- Maintenance - General Settings - Group Temps - No 480 = Y - Save and Close. This



feature uses the same switch as vacancy timesheet.

No	Group	Name	Va
470	Temps	Override Suffix for Replacement Time...	R
480	Temps	Filter Timesheets by period in Vacan...	Y
490	Temps	Auto-filling will ask explicitly availabl...	Y
500	Temps	Placing will register in Vacancy Temp ...	Y
510	Temps	Work Pattern Start Time	09

Separation of Compliance Docs and Docs

This feature separates out Compliance Documents by document type.

To set a document type as compliance you need to tick the Compliance checkbox in Maintenance - Agency Setup - Document Types

Document Type	Record Type	Can Load from Web Site	Notify Staff of Web Uploads	Add to CV Send Out	Compliance	Defunct	Sort Order
Tax Document	All	☒	☒	☐	☒	☐	All
Contract	Company	☒	☒	☐	☐	☐	All
other	Company	☐	☐	☐	☐	☐	All
Placment 1	Placement	☒	☒	☐	☐	☐	All

By default it will be associated with all departments but a selection can be made available using the Department button. In addition, questions can be associated with a compliance document by using the Questions button. When a compliance document is added the questions will be displayed.

To access this feature in the Person form, scroll down the sidebar.

To setup compliance views:- Maintenance - Users - Role - General - Can maintain Clearance/Compliance



Name	Value
Name	Ivan Baldwin
Keyname	BALDWIN IVAN
Login Name	IVAN
Job Title	
E-Mail Address	ivan@iqx.co.uk
Short ID	PI
Template for New Users	☐
Not In Use	☐

Role Group	Group	Role	Search Criteria	Group Assigned	Expires
GENERAL	GENERAL	Permanent Consultant		☒	
GENERAL	GENERAL	Temp Consultant		☒	
GENERAL	GENERAL	Accounts Clerk		☒	
GENERAL	GENERAL	Can maintain Clearance/Compliance		☒	
GENERAL	GENERAL	Can maintain Social Care		☒	

and Maintenance - General Settings - Settings - No. 1810 = N

No	Group	Name	Value	Notes
1800	Settings	Show Rate Filter 3 Description	N	
1810	Settings	Hide Document Pack Sending System	N	Other Settings are needed General 85 and 86, Email/T
1820	Settings	URL Base for DAXTRA linked systems		Format - http://www.iqx.co.uk/ (do not include DAXTRA
1830	Settings	Message blocking old IQX connecting		
1850	Settings	Boiler Plate Menu Break	15	If value > 20 then split menu into sections. The length

Branding

It is possible to set up Automatic shift notifications that send by email, SMS message or print, a confirmation of shifts to clients and/or temps.

These are set up as templates, and functions are created to specify the use, dependent on agency requirements. It is possible to have multiple brands and styles and behaviour is specified to identify which brand, template and method of sending is to be used in which circumstance (for example in the simplest terms which template is used when sending to a temp and which is used when sending to a client).

Documents and reports can also be sent as attachments to emailed confirmations.

As it is fully configurable based on agency requirements, this is a chargeable function and set up costs are based on time. Please contact IQX Support for a quote, demo, or to discuss your requirements.



Maintenance - General Settings Form - Search moved to the left

In Maintenance - General Settings. Search has been moved to the left of the form to provide an initial search focus and a description box has been added.

No	Group	Name	Value
10	Settings	Local IQX Configuration cache	N
17	Settings	Job Title in Contact Address	Y
18	Settings	Department in Contact Address	N
20	Settings	Contact Event Outcomes are Non-Edi...	
30	Settings	Remove Spaces from Keynames	N
40	Settings	Applicant Number on Selector Grid	N
50	Settings	Show Diary Availability by Default	N
60	Settings	Diary Cell Size in Minutes	30

Convert Boiler Plate Text

There is an extension to the webservice CONVERT_BOILERPLATETEXT with new parameters added.

The existing parameters were ID1, ID2, html & Text. Type, ID1 & ID2 can still be used (left in for any job using them) but new parameters have been added:-

person, vacancy, placement, progress, company, employment, shifts, brand, consultant, contactevent (not with ID1 & IQ2 or type) e.g. <StaticFunction service="CONVERT_BOILERPLATETEXT" person="{bpt_personid}" html="No" text="{BPTText}"/>

Note in all of these examples the text parameter MUST come last.

Boilerplate menu list size switch

A switch has been inserted to table the boiler plate menu column so they do not stretch beyond the screen.

This function can be enabled via Maintenance - General Settings - Group - Settings - No 1850 and inserting the number of Boilerplate items required before an additional column is started. Note if the value inserted is below or equal to 20 this function will keep the list as a single column.



No	Group	Name	Value	Notes
1830	Settings	Message blocking old IOX connecting		
1850	Settings	Boiler Plate Menu Break	15	If value > 20 then split menu into sections. The length of each section will be the value.
1860	Settings	Scan Timesheet Division Link	N	If Y (YES). Default the division to 'All' on scan timesheet link.
1870	Settings	Resolution for Compliance Documen...	72	Allows fine tuning of readability/size
1880	Settings	Compression for Compliance Docum...	75	Allows fine tuning of readability/size

Ability to Block Extra States of Clients

A new switch has been added to allow the blocking of certain Client States from the pick lists when adding a new vacancy.

Then access - Maintenance - General Settings - Switchable Fields - No 2800 and insert the Company states that will be blocked.

No	Group	Name	Value	Notes
2760	Switchable Fields	Placement Selector Switchable Field ...		
2770	Switchable Fields	Placement Selector Switchable Field ...		
2780	Switchable Fields	Placement Selector Switchable Field ...		
2800	Switchable Fields	States to exclude from new temp vac... C		List of client states, no separators, to be excluded when selecting new temp vacancy
2850	Switchable Fields	Delete in bulk on Diary List	Y	

The Company State codes are in Maintenance - Agency Setup - Company States.

State	Name	Order	Grid Order
P	Prospect	10	10 P
C	Client	20	20 C
I	Invoice Address	25	25 I
S	Supplier	30	30 S
A	Secondary Agency	35	35 S
	Archived	40	40 C

Changes to Jobrunner Commands <Set Variable> and <If>

In Jobrunner <SetVariable> will now allow regular expression substitutions and <If> will do regular expression matches.

Refer to <SetVariable> and <If>



Add to Diary List Option to Multiselect and Delete

This feature enables multi-selecting and deletion in Diary List. To use this feature - Desktop - Diary List - Highlight the entries to be deleted using the mouse and the Ctrl key - Delete - Confirm.

To enable this feature will require the ability to delete major records - Maintenance - Users - Roles - General - Can Delete Major Records - Tick.

Group	Role	Search Criteria Group	Assigned
GENERAL	Can edit their own records		☒
GENERAL	Can edit the Consultant field of		☒
GENERAL	Can delete major records		☒
GENERAL	Manager		☒
GENERAL	Can view embedded web pages		☒
GENERAL	Can access Hydra web site		☒

Along with the setting to delete in bulk on Diary List. - Maintenance - General Settings - Group - Switchable Fields - 2850 - Delete in Bulk on Diary List = Y.

No	Group	Name	Assigned
2800	Switchable Fields	States to exclude from new temp vac... C	
2850	Switchable Fields	Delete in bulk on Diary List	Y

If All Users are selected but the User has been restricted from deleting other users reminders the Delete button will not show.



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