



# 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

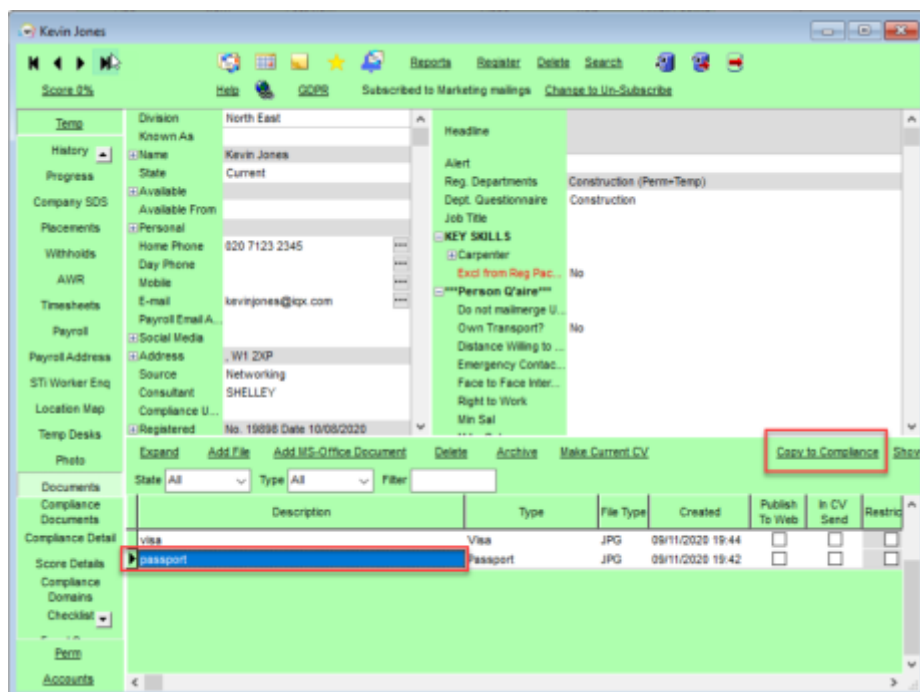
#### Separation of Compliance Docs and Docs

This feature separates out Compliance Documents by document type.

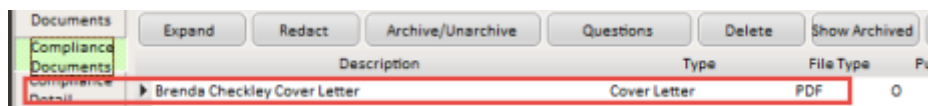
To access this feature in the Person form, scroll down the sidebar.

Compliance documents can be created in:-

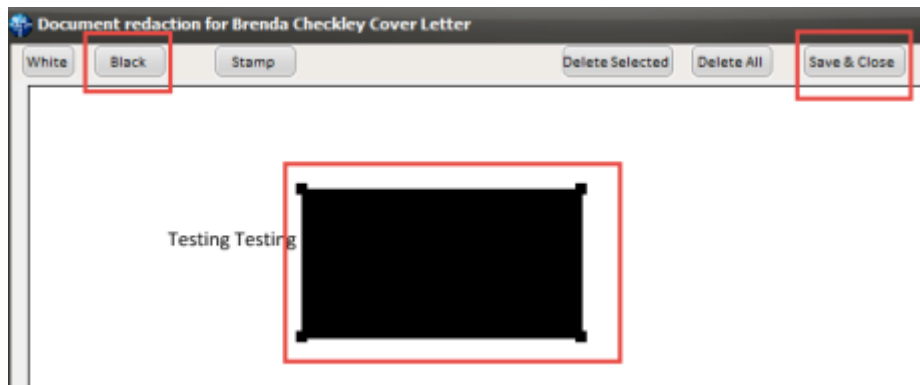
Person form – Documents – Select document – Copy to Compliance OR Drag a document into Compliance Documents. Select all or part of the document – Save Compliance – Select Document Type – Complete Compliance document questionnaire.



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



Compliance documents may be redacted. Select the document – Redact – Select the Black or White button – Click and hold down the left mouse key to drag a square over part of the document – Save and Close.



Redacted documents have a file type R in Compliance Documents.

|               |                                                                          |  |  |  |  |
|---------------|--------------------------------------------------------------------------|--|--|--|--|
| Questionnaire | <div>ExpandRedactArchive/UnarchiveQuestionsDeleteShow ArchivedShow</div> |  |  |  |  |
| Notes         |                                                                          |  |  |  |  |
| 2nd Notes     |                                                                          |  |  |  |  |
| Reference     |                                                                          |  |  |  |  |
| History       |                                                                          |  |  |  |  |
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This feature may require System Administrator setup.

## 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.

## 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

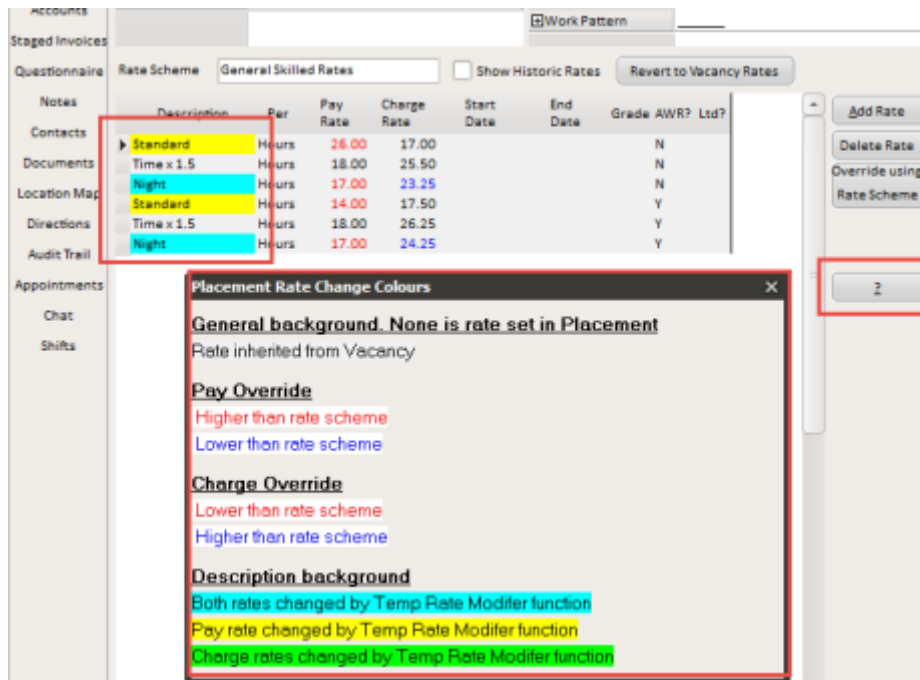
Company Expand Add Employment Delete Employment Make Internal Withhold Process Companies

| Company                           | Job Title                 | Temp                                | External                 | From       | To         | Salary | Concurrent                          | By Us                               |
|-----------------------------------|---------------------------|-------------------------------------|--------------------------|------------|------------|--------|-------------------------------------|-------------------------------------|
| AWR Applies TEST CHANGE           | ASA Shift Test            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 22/11/2011 | 06/12/2011 |        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| AWR LEAGGS School                 | Advanced Cover Supervisor | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 03/12/2011 | 03/12/2011 |        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| AWR Private School                | Big Cover Supervisor      | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 24/11/2011 | 24/11/2011 |        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| AWR Private School                | Big Cover Supervisor      | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 01/12/2011 | 01/12/2011 |        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| AWR Private School                | Big Cover Supervisor      | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 08/12/2011 | 08/12/2011 |        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Faculty of Public Health Medic... | For Withhold from Group   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |            |            |        | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |

## 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.



| Description | Per   | Pay Rate | Charge Rate | Start Date | End Date | Grade AWR? | Ltd? |
|-------------|-------|----------|-------------|------------|----------|------------|------|
| Standard    | Hours | 26.00    | 17.00       |            |          | N          |      |
| Time x 1.5  | Hours | 18.00    | 25.50       |            |          | N          |      |
| Night       | Hours | 17.00    | 23.25       |            |          | N          |      |
| Standard    | Hours | 14.00    | 17.50       |            |          | Y          |      |
| Time x 1.5  | Hours | 18.00    | 26.25       |            |          | Y          |      |
| Night       | Hours | 17.00    | 24.25       |            |          | Y          |      |

**Placement Rate Change Colours**

General background. None is rate set in Placement  
Rate inherited from Vacancy

**Pay Override**  
Higher than rate scheme  
Lower than rate scheme

**Charge Override**  
Lower than rate scheme  
Higher than rate scheme

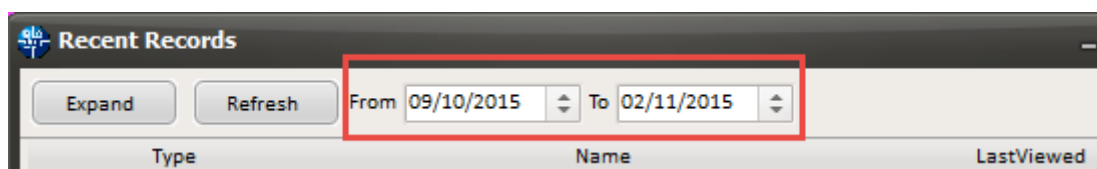
**Description background**  
Both rates changed by Temp Rate Modifier function  
Pay rate changed by Temp Rate Modifier function  
Charge rates changed by Temp Rate Modifier function

2

## 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.



**Recent Records**

Expand Refresh From 09/10/2015 To 02/11/2015

Type Name LastViewed

## Boilerplate menu list size switch

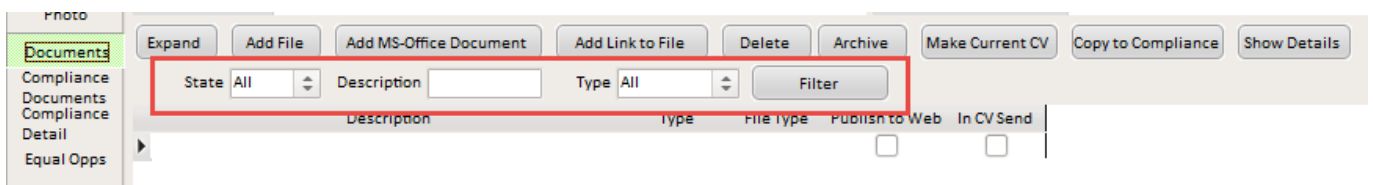
A switch has been inserted to the boiler plate menu column so they do not stretch beyond the screen.

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.

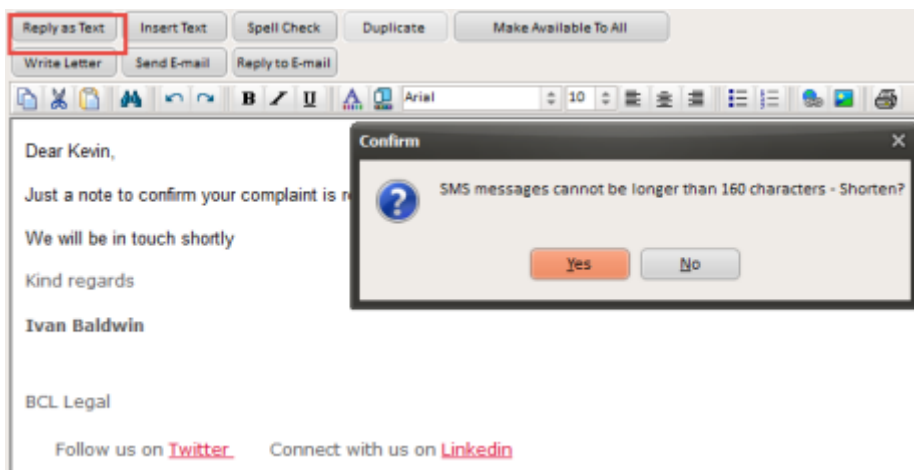
This feature allows searching and filtering of Document State and Type along with key word searching in the description.



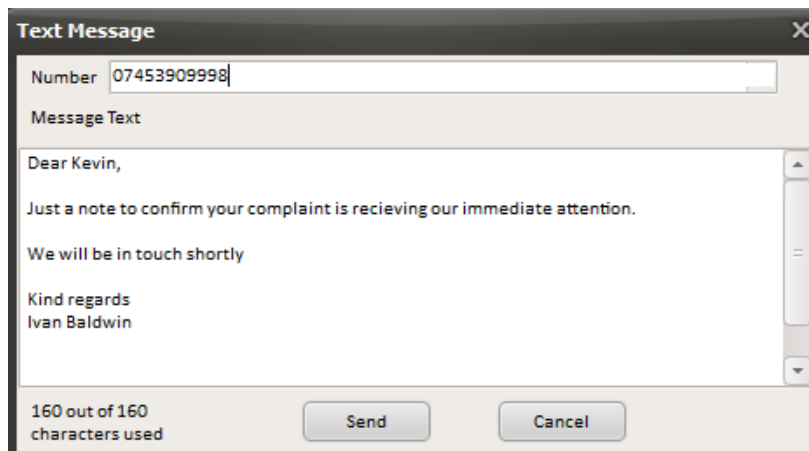
In addition, the sort order has been amended to place any archived records at the bottom of the list.

## 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 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' tab of a timesheet form. The form has a sidebar with options: 'Details' (selected), 'Shifts', 'Linked Timesheets', and 'Questionnaire'. The main area displays fields for 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                      | Activated | 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         | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | All        |
| Contract      | Company     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | All        |
| other         | Company     | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | All        |
| Placment 1    | Placement   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 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 | <input type="checkbox"/> |
| Not In Use             | <input type="checkbox"/> |

| Role Group | Group   | Role                              | Search Criteria | Group Assigned                      | Expires |
|------------|---------|-----------------------------------|-----------------|-------------------------------------|---------|
| GENERAL    | GENERAL | Permanent Consultant              |                 | <input checked="" type="checkbox"/> |         |
| GENERAL    | GENERAL | Temp Consultant                   |                 | <input checked="" type="checkbox"/> |         |
| GENERAL    | GENERAL | Accounts Clerk                    |                 | <input checked="" type="checkbox"/> |         |
| GENERAL    | GENERAL | Can maintain Clearance/Compliance |                 | <input checked="" type="checkbox"/> |         |
| GENERAL    | GENERAL | Can maintain Social Care          |                 | <input checked="" type="checkbox"/> |         |

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     |       |
| 1820 | Settings | URL Base for DAXTRA linked systems  |       |       |
| 1830 | Settings | Message blocking old IQX connecting |       |       |
| 1850 | Settings | Boiler Plate Menu Break             | 15    |       |

## 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.

## Menu list size switch

A switch has been created to force File, Divisions and Insert Text - Boiler plate menus 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.



General Settings

Name or Notes

Search

Group Settings

Branch All

Get Colour

Save and Close

Abandon

Update

Help

| 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.

General Settings

Name or Notes

Search

Group

Switchable Fields

Branch

All

Get Colour

Save and Close

Abandon

Update

Help

| 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.

| Maintenance - Agency Setup |                  |         |            |   |
|----------------------------|------------------|---------|------------|---|
| Save And Close             |                  | Abandon | Update     |   |
| Boiler Plate Text          |                  | Add     | Delete     |   |
| E-mail Signatures          |                  |         |            |   |
| Contact Event Types        |                  |         |            |   |
| Contact Event Outcomes     |                  |         |            |   |
| Sources                    |                  |         |            |   |
| Company States             |                  |         |            |   |
| Person 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       |                       | <input checked="" type="checkbox"/> |
| GENERAL | Can edit the Consultant field of |                       | <input checked="" type="checkbox"/> |
| GENERAL | Can delete major records         |                       | <input checked="" type="checkbox"/> |
| GENERAL | Manager                          |                       | <input checked="" type="checkbox"/> |
| GENERAL | Can view embedded web pages      |                       | <input checked="" type="checkbox"/> |
| GENERAL | Can access Hydra web site        |                       | <input checked="" type="checkbox"/> |

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                                     | Delete in bulk on Diary List |
|------|-------------------|------------------------------------------|------------------------------|
| 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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