Overview of New Features

Below is a summary of the main new features that have been implemented between version 2.16.6 and 2.22.09 (inclusive).
For more details please see the Release Notes for the particular version.

New User Roles and Layouts

Version	Role/Layout
2.23.40	New accounts role to change Candidate Payroll Company
2.23.40	Role to limit access to Unsubscribe to Marketing button
2.23.30	Role to deny access to Person Archived Records
2.22.06	Send notes to groups of Users
2.22.02	Role to access iqxWEB Setup on Maintenance menu
2.21.08	User Role that allows provisional timesheet creation without Accounts role
2.21.04	Agency Questions can be included in Email Signature.
2.21.04	Ability to add a New Vacancy view on the Desktop.
2.21.02	New collections / Internal chat feature available on Desktop.
2.21.02	New role to enable users to change Direct Engagements.
2.20.11	Users can select an alternative Theme to change the display colours and buttons.
2.20.11	Users can select Standard or Relaxed line depth.
2.20.6	Personalise the side bar of IQX Records
2.20.4	Role to allow All on mailmerge
2.20.4	IQX Reminders and Appointments linked to Outlook
2.19.2	Alternative Button bars per User
2.18.8	Extend User email address field to 100 chars
2.18.8	Leaving or Deleting User tidies IQXWeb access
2.18.6	Role to be able to Delete Documents
2.18.6	New user layout setting 'Can Delete Documents'
2.18.6	New user role 'Data Protection Manager'
2.18.4	New user role 'Can maintain Compliance Docs'
2.18.2	Adding and Maintaining Users
2.17.12	Quick lookup facility on Person Selector
2.17.12	Filter boxes on Person & Company Selector
2.17.12	Can use GDPR functionality
2.17.12	Can Maintain Users
2.17.8	Can Send e-signatures
2.17.8	Can edit end date of Contract Placements

Candidates

Version	Feature
2.23.30	Frequently Used drop down option for Address line 3

Version	Feature
2.23.30	Duplicate Check Enhancements
2.23.30	Broadbean - New Ability to Bulk Create Candidate Records
2.22.09	Ability to Re-Register Candidates
2.22.09	Candidates Preferred list of Clients or Shifts
2.22.06	Ability to have Webapp push notification
2.22.06	Candidates able to have a Preferred list of clients and Shift Types
2.22.02	Availability view - Create a linked reminder for Contact Date
2.22.02	Sending Checklist reports from Person record asks for Vacancy Link
2.21.11	Parse CV added to Fast New Person Wizard
2.21.11	Contact Event Call Backs - Linked Pop Up Reminder
2.21.11	Contact Events with linked Candidates
2.21.11	Searching for Vacancies from Person - Option to view results on a Map
2.21.11	Searching for Vacancies from Person - Desk Type mirrors Users Default Temp Desk
2.21.11	Send CV's without invoking the Word Processor
2.21.11	Bulk CV Import for both IQX and IQXanywhere
2.21.08	Optional Document Expiry date field
2.21.08	CV improvements - Now CV can be either Docx or PDF Format
2.21.08	Save Emails in Documents and Compliance Documents
2.21.08	Start the New Person Wizard directly from IQX Inbox.
2.21.04	Departmental Questions can be added to Contact Event Questionnaire.
2.21.02	Document signing - Refinements.
2.21.02	Fast New Person Wizard now shows Temp Desks.
2.20.11	Ability to select other recipients when sending email Notifications
2.20.11	Ability to send Notifications directly from Candidate record
2.20.11	Compliance Documents Dynamic Stamping
2.20.11	Global Key Word search for candidates and clients
2.20.9	Employment history can be added when parsing a CV
2.20.9	Add to favourites direct from record
2.19.11	Can drag person from favourites to a shortlist
2.19.4	Candidates can have more than one Consultant
2.18.11	Broadbean amendments when adding new Candidates
2.18.11	Bulk CV import accepts PDFs and Source added
2.18.11	Add a reminder when adding WithHold
2.18.11	Notes can now be indexed searched
2.18.8	Gender Field now also on Payroll view - renamed HMRC Gender
2.18.8	Switch to disable payroll number checking when changing composite template
2.18.6	Move Subscribe options to Person header
2.18.6	Postcode Lookup on Reference Request and Fast New wizard
2.18.6	Secondary Agency form improvements
2.18.6	Adding a Unique Tax Reference to a person record
2.18.6	State Visibility and Consent Management
2.18.4	Select candidate whilst videoing through shortlist

Version	Feature
2.18.4	Auto-matching Candidates to Vacancies
2.17.12	Single Page New Person Wizard
2.17.12	Quick Contact Events
2.17.12	Differentiation between attempt to contact and actual contact in contact events
2.17.10	Thumbnail Photo on Person Button Bar
2.17.8	Candidate Photos can now be archived
2.17.4	PDF CVs can now be imported into CV text
2.17.4	Centralisation of witholding

Companies

Version	Feature
2.22.06	Company record now shows Registration Date
2.22.06	Ability to Search on Notes on certain Selectors
2.21.08	Client Notifications from Shortlist to include multiple candidates
2.21.02	Switch added to tidy away Accounts fields for fixed percents.
2.20.2	Add an accounts contact from miscellaneous view
2.19.11	Companies House Look Up
2.19.11	Vat Number Checker
2.18.11	Sales Role - can now view Placements
2.18.8	Company - Accounts Setup - Indicate fields that should be filled in with an asterisk
2.18.6	Secondary Agency form improvements
2.17.2	Method of Identifying Private Sector Companies re IR35

Searching and Viewing Records

Version	Feature
2.23.01	Search Filter Expansion
2.22.02	Add a selection of highlighted records to Favourites
2.22.02	Booked Holiday and Absence will show against a Contract Placement and Timesheet
2.19.2	Map Button to show location of records
2.18.11	Managers can add to others Stored Selections
2.18.4	New filter field for searching within Maintenance pages
2.18.4	Ability to exclude archived and do not use candidates from vacancy search
2.17.12	Changing Selector Columns and saving their position
2.17.12	Ability to open the same company multiple times with different contacts selected
2.17.12	Filtering within Search Criteria
2.17.12	Easier Access to stored searches and selection
2.17.12	Filtering on Temp Desk temps View including postcode distance filtering
2.17.12	Quick Lookup facility on Person Selector
2.17.12	Filter Boxes on Person & Company Selector

Shifts

Version	Feature
2.23.40	Process for managing shifts for clients who are Self Bill/Managed through Portals
2.23.30	Shift Fill Wizard New Filters
2.22.06	Search both Contract and Shift vacancies, ensuring future shifts exist
2.19.11	Reporting on Shift Prices
2.18.11	Quick Fill Shifts button from Shift Reference
2.18.8	Add Shift reference field to bulk shift adder
2.18.6	Shift Notifications sent to Secondary Agencies
2.18.4	Cancel confirmation notifications from different locations
2.17.6	Notifications to be called from Shifts Finish button
2.17.2	Improvements to filtering shifts
2.17.2	Images can now be included in shift notifications

Vacancies, Progress and Placements

Version	Feature
2.23.01	Contract Placement Candidate Unavailability now visible
2.23.01	Ability to Copy and Link Placements for Contract random working pattern
2.22.09	Placement Terminology Enhancements
2.22.02	Create from Vacancy Stored Search a Global Person Default
2.21.11	Process button and When Entered column added to Placement - shifts view
2.21.08	AWR Linked Placements - Identifying the primary placement
2.21.04	Placement extension system added
2.20.11	Placement rates enhancements to allow margin checks
2.20.6	Send confirmations direct from placements
2.20.6	Placements 'Active' in date range on selector
2.20.6	Work Pattern moved on placement record
2.19.2	Progress Colour
2.18.6	Vacancy Teams extended to Temp Vacancies
2.18.4	Peak BI Integration
2.18.4	Auto-matching Candidates to Vacancies
2.17.6	Salary Field on a Perm Vacancy allows for a range
2.17.2	Direct Link from IQX to Broadbean
2.17.2	Margin calculations can be seen on placement the same as vacancy

Temp Desk

Version	Feature
2.22.09	Temp Desk Expiry Date Exclusions
2.22.09	Behaviour Filter on Temp Desk Compliance
2.22.02	Temp Desk Availability view - Contract Desk - Show work pattern in front of Availability
2.22.02	Booked Holiday and Absence will show against a Contract Placement and Timesheet

Version	Feature
2.22.02	Managers can create Ops Teams for managing Temp Desk Placements and Temps Views
2.21.08	New Temp Desk setting to pre-tick Match exact grade only
2.21.08	Temp Desk Availability - Ability to see all in week on Contract Desks
2.21.08	Scroll arrows added to Temp Desk headers
2.20.6	Temp Desk Expiry Date Improvements - person or compliance consultant
2.20.4	Temp Desk Expiry Date Improvements - Own Candidates
2.19.6	Can Show Unavailability Types on Temp Desk Temps
2.19.2	Role to hide Add Vacancy button on Shift Desks
2.17.12	Filtering on Temp Desk temps View including postcode distance filtering
2.17.10	New Column on Expiry Dates view for shifts after expiry
2.17.8	Can display shifts from multiple desks
2.17.6	Copy & Paste from Fields in Temp Desk – Temps
2.17.6	Filter temp desk temps by available in week
2.17.6	Temp Desk shifts filter – by payroll week
2.17.6	Shift Import from email

Timesheets and Invoicing

Version	Feature
2.23.01	Single Timesheet Image can be linked to multiple Timesheets
2.22.09	Invoices - Add Docs button added to Temp, Perm and Ad Hoc PDF Invoices
2.22.09	Self Bill Enhancements
2.22.09	Warning when Timesheet Images too Large
2.22.02	Signed Timesheets show who signed the Timesheet
2.21.11	Set Client Contacts as Timesheet Authorisers
2.21.11	Provisional Timesheets linked to Special Placements
2.21.08	Filters added to Complete Linked Timesheets view
2.21.04	Notifications can be sent to Candidate and Client from Provisional Timesheets.
2.21.02	Alternative Invoice Addresses and Invoice Prefixes.
2.21.02	Method to edit missing PO numbers from Batch Invoicing form.
2.20.4	Total number of hours now visible on timesheet
2.19.11	Timsheet Improvements
2.19.2	Table of Invoice lines and associated data for GM reporting
2.18.11	Invoice creation blocked if no access to folders
2.18.11	Invoicing accepts JPG timesheet images
2.18.11	Shift description visible on Provisional Timesheets
2.18.11	Timesheet Dispatcher improvements
2.18.8	Add Bulk Delete button to Person-based TS Image linking
2.18.6	Timesheet Image rotation saved
2.18.6	Switch to hide Do Not Transfer on Completed Timesheets
2.18.6	Review of Delete/Cancel button on timesheet with contra timesheets
2.18.6	Statements will use IQX Email signature
2.18.4	New invoice groupings for batch invoicing

Version	Feature
2.18.4	Adhoc invoice form shows template used
2.17.12	Direct Engagement
2.17.6	Provisional Timesheet totals unrounded figures so is different to completed
2.17.6	Improve problem reporting from batch invoicing
2.17.6	Extra warning on timesheet entry
2.17.4	Timesheets can show Tax Method & IR35
2.17.4	Alternative timesheet image linking improvements
2.17.2	Ability to create a credit note directly from an invoice

Compliance

Version	Feature
2.23.40	Automatically answering questions to update Compliance Score when document is signed
2.22.02	Online Reference Request allows saving to Compliance Documents
2.22.02	Save a report as a PDF to Documents and Compliance Documents
2.21.11	Drag Documents out of IQX into a folder or Email
2.21.11	Compliance Documents - Merge two into one
2.18.8	New compliance checking mechanism per Candidate Role
2.18.4	Secure sending of Data Access Requests
2.18.4	Remove bank details as part of P45 process
2.18.4	Gender Pay Gap Reporting
2.18.4	Bulk deletion of historic documents
2.18.4	New user role 'Can maintain Compliance Docs'

IQXWeb

Version	Feature
2.23.40	New switch for Web account deletion
2.23.01	Universal Notes visible to candidate on Portal home page
2.22.06	Online Web References - Can now be edited before sending to the referee
2.19.6	Wizard to set up Profiles and Users to Support IQXHub Web Services
2.18.8	Documents uploaded from IQXWeb Portal Compliance process
2.18.8	Sources - Add publishtoweb to orgin table to control what sources show on IQXWeb
2.18.6	IQXWeb Maintenance - Documents maintenance form changes
2.17.10	Ability to link all companies in a Group for IQXWeb
2.17.8	Candidates with Web access now able to see and complete all timesheets online

System Administrator

Version	Feature
2.23.01	Ability to create a Deep Link in a Merge Field
2.22.09	Logging added when doing DBupdate
2.22.09	Stored Selections on User Selector
2.22.09	Ability to replicate the assigned rights/permissions of a particular user

Version	Feature
2.22.09	Set a Default Vacancy Role on Client Temp Details
2.22.06	Audit when Contact Event type is merged or deleted
2.22.06	Audit Trail for Person Notes
2.22.06	Audit when a composite company is selected in Person Payroll
2.22.06	New Role for setting up Domains
2.22.06	Ability to add a table to Boiler Plate Text templates
2.22.02	Job to create Provisional Timesheets for all or selection of Temp Desks
2.22.02	User Auditing - Changes to Division and other major Staff fields
2.22.02	New Vacancy Questionnaire group that can only be edited by Managers
2.21.11	Disconnecting Composite Company Templates
2.21.11	Job Runner Schedule 'Run now' button
2.21.08	'System Only' Consultant logins possible
2.21.08	Auditing added when a contact that has open vacancies is moved to a new company
2.21.08	Global Default Rate Scheme - E-Timesheets
2.21.08	Availability Reasons - Merge option
2.21.08	Shift Cancel Reasons - Merge option
2.21.08	Temp Desk Availability - Ability to search for Non-Current candidate states
2.21.08	Client Notifications from Shortlist to include multiple candidates
2.20.9	Frequently used counties
2.20.4	Switches for New Person Wizard
2.20.2	Option to set Email, Mobile, Address and Postcode as required fields
2.19.11	IR35 Legislation Changes
2.19.6	Document Templates can now contain tick boxes
2.19.6	Mail Chimp separable by Division
2.19.4	Person States can be divisionalised
2.19.2	Switch to turn on default Tax Method of Ltd
2.18.11	Skype for Business integration
2.18.8	Zero Pay & Charge Warnings Configurable by Division
2.18.8	Questionnaire code and data Restore process in maintenance
2.18.8	Simple Web and Database Connection Check from Help Menu
2.18.8	Merge WPKMaintain into IQX
2.18.8	Allow web service call for Telephony links
2.18.8	Switch to allow spaces in Question Choice analysis field, default is NOT allowed
2.18.8	SQLTool has selector for Procedures and Functions
2.18.8	Add Find and Line Number to Database Functions
2.18.8	Add indicator to General Settings to show that a Custom HTML SMS function is in use
2.18.8	Governor resource for Max_Statement_Count increased to 200
2.18.8	Transactionalise WPK updates
2.18.8	After WPK is applied a message to say 'Please re-start the program'
2.18.8	Remove redundant custom field WPK switches
2.18.8	Delete button on Hub Monitor view in database diagnostics
2.18.6	Date of Birth Validation

Version	Feature
2.18.6	Group Email setup for XML jobs
2.18.6	Division controls re Cancel & Correct
2.18.6	Single Sign On
2.18.6	View Static Data Downloads
2.18.6	Function to extract text from Contact Events html
2.18.6	Database updates - allow force attempt where multiple connections
2.18.6	Database Diagnostics view to show database update history
2.18.6	General Settings - changes for more logical groupings
2.18.6	Ensure that using & in a Question or Choice ID functions
2.18.6	Ensure IQXHub backup does not trigger Button Bar failure button
2.18.4	Wizard for tidying tasks on User leaving
2.18.2	Restrict Access to Specific Document Types
2.18.2	Set the Maximum Number of Windows that can be Open
2.18.2	Switch to Make Source Required on New Person Wizard
2.18.2	Switch when adding History to Filter Certain States
2.18.2	Maximising Window only Affects Window in Focus
2.17.12	Simplified method of setting up custom columns
2.17.8	Candidate Bank Details can be Obscured
2.17.4	Bank Scan replacement
2.17.2	Enforce End of week dates in Rates Scheme
2.17.2	Dynamic Rate Schemes – apply dates to overrides
2.17.2	Extra columns on rate schemes to record information for reporting
2.17.2	Auditing of rate changes

Miscellaneous

Version	Feature
2.23.40	Improvements to References on Desktop
2.22.09	Online References Available from Desk Top
2.22.06	Desk Top Inbox - Default folder indication
2.22.06	Desk Top Inbox - Filter and Search
2.22.02	Various Improvements to Notifications
2.22.02	Reports can have editable fields
2.22.02	Various Improvements to the Inbox on the Desk Top
2.21.11	Specify a limit for the number of emails and texts that can be sent
2.21.11	Sort Order added to Desktop - Charts view
2.21.11	Save a report as a PDF to either Documents or Compliance Documents views
2.21.08	Reconnect button added to the File Menu
2.21.08	Filter added to Inbox and sortable columns
2.20.4	Reports can output to multiple named sheets
2.20.4	Ability to save Agency Documents in database for jobs access
2.20.2	Desktop has a view for a definable state of person e.g. in registration
2.18.11	Managing MailChimp Unsubscribers.

Version	Feature
2.18.11	Ability to drag link a record to an unlinked email in the IQX Inbox
2.18.8	Audit additions - Placement TheirRef, Database Functions
2.18.6	Documents to display html and text files
2.18.6	Prevention of using a Payband limited to a division
2.18.6	Hide option to include Unsubscribe to Marketing in Mail Merge
2.18.4	Headline available on contact events
2.18.4	Adding deletion dates to individual documents
2.18.2	Contact Event- Email Sent Log
2.17.10	Add other staff to Pop Up Reminders
2.17.8	Changes to Vacancy Shortlist and Desktop Progress views to show additional information
2.17.8	New questions in placement that only managers can answer
2.17.8	Can now only delete your own favourites
2.17.6	Table constraint preventing zero week timesheets being added to the database
2.17.6	Recent IQX to only use WPMaintain2
2.17.4	Left Button bar
2.16.12	Active Directory Single Sign on
2.16.8	Favourites – can be viewed and amended by users in same div, can be Processed, added from stored selection
2.16.6	Users can build own Favourite List of document Templates

From:
https://iqxusers.co.uk/iqxhelp/ - **IQX**

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:releases_overview_of_new_features&rev=1706790950

Last update: **2024/02/01 12:35**