# 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 |
|---|---|
| 2.25.20 | New role that allows creating Support Tickets from within IQX |
| 2.25.10 | New ability to set Temp Desk access |
| 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 |
| 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 |

| Version | Feature |
|---|---|
| 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 |
| 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 |
|---|---|
| 2.24.10 | Postcode Distance on Person and Contact Selectors |
| 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 |

| Version | Feature |
|---|---|
| 2.17.12 | Quick Lookup facility on Person Selector |
| 2.17.12 | Filter Boxes on Person & Company Selector |

## Shifts

| Version | Feature |
|---|---|
| 2.25.10 | Extension to copy shifts functionality |
| 2.25.10 | Shift Fill Drag and Drop |
| 2.24.20 | Move Shift - limiting Vacancies presented |
| 2.24.10 | Place to manage Shifts in Progress |
| 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 |
|---|---|
| 2.25.10 | Option to choose what is copied when duplicate button is used |
| 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 |

| Version | Feature |
|---|---|
| 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 |
| 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 |
|---|---|
| 2.24.10 | E-Timesheet New Features |
| 2.24.10 | Send Invoices - attach documents while sending out |
| 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 |

| Version | Feature |
|---|---|
| 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 |
| 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 |
|---|---|
| 2.25.10 | Email files added to compliance documents can be linked to questions |
| 2.25.10 | Compliance Tool Tips |
| 2.25.10 | Compliance Score can now include documents and references |
| 2.24.20 | PNG Compliance Documents |
| 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 |

| Version | Feature |
|---|---|
| 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 |
|---|---|
| 2.26.10 | Can send Mail Merge via SMTP |
| 2.25.20 | Ability to edit email to all recipients |
| 2.25.10 | Vacancy Shift Edit pre-validation |
| 2.25.10 | Minimum character numeric questions |
| 2.24.10 | SQL Tool F9 key to execute |
| 2.24.10 | Divisionalised Nominal Code segments |
| 2.24.10 | Broadbean no longer supporting integrated browser |
| 2.24.10 | Limit pay bands to those in rate scheme |
| 2.23.40 | Bank Holidays per Region |
| 2.23.40 | Make the Stamp Date description switchable so 'Verified Date' can be changed |
| 2.23.40 | Contact events - make “all including system” filter default switchable |
| 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 |
| 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 |

| Version | Feature |
|---|---|
| 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 |
| 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 |

| Version | Feature |
|---|---|
| 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 |
|---|---|
| 2.25.20 | Hot swap files in Global Documents |
| 2.24.20 | Daylight Saving Changes |
| 2.24.20 | Document Signing and Notifications |
| 2.24.10 | Charts - refresh on dashboard |
| 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. |
| 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 |

| Version | Feature |
|---|---|
| 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 |

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