Users

A User is somebody working within the agency. Everyone who will be logging into IQX must be entered as a user. Users are connected to areas of location (branch and division) and expertise (department) and have access rights set to areas of the program. The System Administrator must be set with full rights. User Details are the main settings for a User. It is sensible to have the login name to be the same as the Windows login name.

2.22.9+ Users that have admin rights will now have a new view on the file menu - Assume User Roles. This will allow a user to change your role to that of the selected user, i.e. what buttons, menu items, views and fields you can see and edit. It does not turn you into that user. It does not currently change report access levels or change your division access. This can be useful for trying to get to the root of a user issue - whether it's environmental or a configuration setting or other.

Buttons

If setup to use document stamps there will be an Add Signature button to create the Departmental Stamp for the User using a .jpg or .pngfile of the signtature. **Reset Password** or **No Password**
A User who has a password will have the button **Reset Password**. There is no method to send a User their existing password, it has to be reset to blank and the user has to enter a new one on login - go to File menu, Change Password - depending on what the Agency's password settings are. On clicking the button it will be replaced by the **No Password** button, to indicate that there is no password in place.

Leave
The Leave button invokes the User Leave Actions wizard, that helps carry out the actions needed when a User leaves your organisation.

Top Section

Main details about the User.

Division is for allocating to a User what data they can view. If users are to be restricted to only seeing data attached to their default division, or selected, they should also have Own or Select the appropriate ones in Division Access.

If you tick the **Use as Template** box when you create a new User it will use this record as template to set default Roles, Maintenance etc. If Not in Use is ticked then the User cannot log in to IQX and the User name will not appear in the Desk Top or Contact Event Selector drop down.

Reporting Rights enable sophisticated levels of access to reports and what can be done with them.

Users can View, Print or Edit reports which have an Access Level up to the same figure as their Reporting Rights figure. Suggest 0 for casual/Temp Users, 100 for Consultants, 200 for Admin Staff, 500 for Managers, 999 for System Administrator.

TS Query Code determines which Timesheet Query Reasons a user can set when creating a Timesheet Query. The Code(s) specified relate to those set in Timesheet Query Reasons

Override Form ID Advanced Users Only Allows a user to be given a different menu structure from the default. This must be used with great care, and only in consultation with IQX Support - an incorrect choice may result in users being unable to access the system.

Startup Form Advanced Users Only Specifies an IQX form which will be loaded when the user first logs in. This must be used with great care, the form must not require parameters to be supplied at load time. Safe choices include DESKTOP, PERSONSELECTOR, COMPANYSELECTOR & TEMPDESK. If in doubt, consult IQX Support - an incorrect choice may result in users being unable to access the system.

Startup in Own Division If a user has access to more than one division but primarily works from one this can be set so that when they log in to IQX it opens on their default division.

System User If the record has been created simply to be associated with automatic jobs this should be ticked so that any contact events created as part of the job running will be filtered on the Person, Company and Vacancy selector.

Roles View

This is broken down into five sections: **General** - apply to all users, **Maintenance** – Assigns configuration maintenance rights to a user; you may want to restrict which users have access to these roles **Superuser** – rights for working across Divisions **Temp** – Options for editing fields that apply to Temp Candidates. **WP** – Word Processing capabilities.

- **Permanent** Consultant, **Temp** Consultant, **Accounts** Consultant all have default views in the main records and have different levels of rights. Consultants who deal with Temps and Perms should have both ticked. The Accounts view shows and has rights in Accounts and Payroll details. These can be refined on configuration.
- **Edit Rights** govern the extent of records a user can edit. If Edit the consultant field of a record is ticked they will not be able to enter (or alter) a contact event or diary appointment for another user.
- Those with **Manager** rights can authorise discounted or sub-standard placement fees whose invoice details would otherwise fail validation. They can also override other validations, if enabled, such as not allow placements for clients On Stop. Duplicate records can be combined using the Drag Merge Facility. Best reserved for System Administrator and Managers.
- **Maintenance** Rights allow editing of the agency set up and configuration. These should be restricted where questionnaires and templates are concerned. Full rights allow access to everything. To enter Users you must have full rights. Department maintenance means the user

can add or edit criteria to the department questionnaires. Can be given to the head of each department.
- **Document Templates** allows editing and adding. Useful for Administrators.
- **Rate scheme** maintenance allows new schemes to be added and set up for departments and clients. If you want to restrict consultants to only use rates which have been set up then do not give them this right, or Can Override Temp Pay/Charge rates.
- **Report rights** allow the user to Add, Delete, set access levels and edit reports. Should be restricted.
- **Super Users** – users with a good knowledge of the program and high position in the agency.
- Where an Agency wants each division to have viewing restricted to only clients, vacancies and candidates belonging to that division, only a few users should be able to view and be able to edit a division field. **Duplicate Person and Company records** can be drag-merged together. However this is irreversible so the right should be limited.

Questionnaire View

Questions can be set for Users such as Direct Telephone Numbers – which can be used with Email Signatures or letters. The questions are set in Maintenance » Questionnaires » Consultant Questionnaire

Division Access View

This grid specifies which divisions the user can access. There are three options – ‘All’, ‘Own’ and ‘Selected’ By selecting ‘All’ the user can access every division, and work with companies/candidates/vacancies in every division within the database. By specifying ‘Own’ then the user can only work within the division assigned to them when they were first entered into IQX. Alternatively, you can specify individual divisions a user can have access to by clicking the ‘Selected’ button, and ticking each division as required.

Department Maintenance View

A user can carry out maintenance work on a department (questionnaires associated with department for example). Specify here which departments the user can have maintenance rights over. In order for this to be granted, the user also requires the ‘Department Maintenance’ Role.

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