



Documents

Refers to:

Company form → documents tab
vacancies form → documents tab
Candidate form → documents tab

You may link any type of document, for example, directions, copies of terms of business and agreed rates.

- Documents added as Files cannot be edited after saving.
- Documents added as MS Office files can be edited.
- Only MS Word Documents can be attached to emails.
- An email that has been saved to a folder can be added as an MSG file (2.21.8+)

see also

[Documents](#)

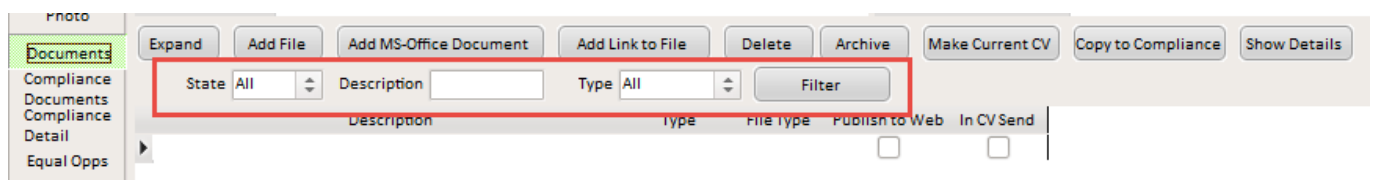
(2.3.4+) Documents can be archived in all document views: [Archiving](#)

Document Filtering

(2.3.5+)

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.

Document Expiry date

From version 2.21.8+ a column for xpiry Date has been added to the Documents view of Person records. This is NOT linked to a question and can be amended on the view.



This is particularly useful if your agency does NOT use IQX Compliance Documents and therefore does not capture linked expiry information.

The screenshot displays the IQX user interface for Alexandra Poppy Abbott. The interface includes a top navigation bar with buttons for Reports, Register, Delete, Search, and a status bar indicating 'Un-SUBSCRIBED from Marketing mailings'. The main content area shows a profile card for Alexandra Poppy Abbott, including details like Name, State, Available From, Personal, Home Phone, Day Phone, Mobile, E-mail, and Payroll Email Address. A dropdown menu is open, showing options like Headline, Alert, Reg. Departments, Dept. Questionnaire, General Skills, Chef Skill, Grade, Speciality, Chef Expiry Date, Test number for dec pla, and Type of Holiday Pay. Below the profile card, there are buttons for Expand, Add File, Add MS-Office Document, Delete, Archive, Make Current CV, and Copy to Compliance. The 'Documents' tab is selected, showing a list of documents with columns for Description, Type, File Type, Created, Expiry Date, Publish To Web, and In CV. The 'Expiry Date' column is highlighted with a red box, showing dates like 31/07/2021.

Because this would not be useful for all agencies this is switchable and would need to be activated by a System Administrator.

Compliance Documents

From version **(2.3.5+)** onwards there are separate views for Compliance Documents and Documents. For more information on Compliance Documents [click here](#).

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