



Release 2.15.11

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.

New Features

Users

Improving speed of matching known temps to a shift.

An 'Add Shifts' button has been added to Temp Desk – Temp to provide an alternative route to adding shifts in addition to the 'Add Shifts' button in Temp Desk – Vacancies.

The screenshot shows the 'Temp Desk' interface. At the top, there's a header with 'Desk', 'View', 'Year', and 'Week'. Below this, a table lists various shifts. The 'Add Shifts' button is highlighted in a red box. The table has columns for 'Temp', 'Known As', and dates from Monday to Sunday.

From Temp Desks select a candidate – Add Shift – Fill in Shift Details – Save and Fill and the form below will appear with the last person ticked visible. Continue to fill the shift.

The screenshot shows the 'Operator at 3I Group PLC' form. The 'Match from' section has several radio buttons, with 'Checkley, Brenda' selected and highlighted in a red box. The 'Match' section has a 'Starting' date of 02/11/2015. The 'Previously worked only' section has radio buttons for 'No', 'Company', and 'Vacancy'. The 'Date from' and 'Date to' fields are empty. A red box highlights the text 'You can drag a person HERE to match'.

In addition, it is now possible to drag a candidate to the 'Fill Shifts' window, from the Person Selector. Ensure the Person has their name checked and continue to fill the Shift.



Person, Payroll. "Awaiting NI" added.

Where a candidate has not provided their National Insurance number this can be recorded by using the New 'Awaiting NI' tick box. This function does not transfer to payroll. Contact IQX if needed.

This can be accessed via the Person Selector - Payroll - Scroll down the lower part of the table.

The screenshot shows the IQX software interface for a person record. The window title is 'Brenda Checkley'. The interface has a green header bar with navigation buttons and a menu bar. The main area is divided into several sections. On the left, there is a sidebar with various tabs like 'Temp', 'Contact Events', 'Compliance', etc. The main content area is divided into two columns. The left column contains personal details for 'Brenda Checkley', including her name, date of birth (Female 36), home phone, day phone, mobile, email, and payroll email. The right column contains job-related details, including her division (BR Derby), headline, alert status, registered departments (Construction* (Temp)), department questionnaire (Construction*), job title (Civil Draughtsman, Coded Welder), key skills (CSCS), and CSCS expiry. At the bottom of the interface, there is a section for 'Holiday Pay' and 'Awaiting NI'. The 'Awaiting NI' checkbox is checked, and it is highlighted with a red rectangle. Below this, there is a section for 'NI/Tax Details' with fields for 'Title for Payroll' (Ms), 'Composite Co Pay Ref', and 'No Holiday Pay'.

Employment History - Unlinked Companies

Employment History with companies who are not recorded on IQX can now be added to a Person record.

In Person record - History - Add Employment/Delete Employment - No and complete the details and save.



If, later, it becomes worthwhile adding the company to Company records this can be completed by making the employment internal via the 'Make Internal' button.

Allow ascending/descending sorting on shifts

Ascending and descending sorting has been provided in Temp Desk - Vacancy - Shifts for 'Our Ref' and 'When Entered' columns.

Web Referencing

Users can now send reference requests and receive references from within IQX via the web. Referees will be able to log onto a temporary website to complete the reference which will automatically update the IQX database. This functionality requires System Administrator set up in addition to IQX set-up of the database/wpk, IQXHub and some IQXWeb functionality.

[web_referencing_user_guide_.docx](#)

Temp Desk



Tempdesk, Expiry Dates. New filters added.

To improve the ease of searching within Temp Desk - Expiry Dates, new filters have been added - 'Working this week' and 'Person state'.

Temp Desk - Expiry Dates - Working this week filter (click button) - Person State filter click buttons.

The screenshot shows the 'Temp Desk' application interface. At the top, there's a header bar with 'Temp Desk' and a search icon. Below it, a navigation bar contains 'Desk' (Social Work), 'View' (Weekly Shift), 'Year' (2012), 'Week' (6), and 'Ends 13/05/2012 (Current)'. There are buttons for 'Process', 'Update', 'Close', and 'Help'. A sidebar on the left lists various functions: Vacancies, Temps, Placements, Vacancy, Shifts, Timesheets, Transfer, Cascades, and AWR Temps. The main area features a search bar, 'Expand' button, and radio buttons for 'Current Pool' and 'Entire Pool'. It also has 'Temps to Show' options: 'All' (selected), 'Expired and Expiring', and 'Expired Only'. A 'Clear Column Filter' button is present. A table displays data with columns: Name, Alert, Days before Expiry, CRB Expiry Lead 60, and Visa Expiry Lead 60. The first row shows 'Abraham Ford' with values 281, 31/12/2016, and 13/08/2016. On the right, a 'State' dropdown menu is open, showing options: All, C Current, P Placed, L Client, R Pre registration, D Not Active, A Secondary Agency, N Client/Candidate, Z Umbrella, and . Archived/DNU. A 'Working this week' checkbox is also visible.

Name	Alert	Days before Expiry	CRB Expiry Lead 60	Visa Expiry Lead 60
Abraham Ford		281	31/12/2016	13/08/2016

Shift/Vacancy Confirmations and Auditing

Confirmations details are recorded for Shifts and Vacancies.

In Vacancies - Temporary Vacancy - Diary - Right click an Appointment - Edit - View the information at the bottom of window.



Shift

Consultants Entered by: IVAN 27/10/2015 10:58 Filled by: IVAN 27/10/2015 10:59

Our Ref. 9425

Date 02/11/2015

Time From 08:00

Time To 17:00

Minutes Required 0

Break (minutes) 60

Recovery (hours) 2

Moveable ☒

Client Must Confirm ☒

Temp Must Confirm ☐

Shift Type Standard Day

Analysis Code

Reference Required Not Required

Description Day

Essential Skill(s)

Grade Required

Note

Their Ref. IVAN

Ordered By IVAN

Client Note datha

Confirmed With Ivan

Who Temp Confirmed Ivan Baldwin

When Temp Confirmed 30/10/2015 12:32

Who Client Confirmed Ivan Baldwin

When Client Confirmed 30/10/2015 12:31

OK Cancel

In Temp Desk – Shifts – Details Tab – scroll to bottom of the window.



Details		Quick Fill	Short List	Cascade History	Audit Trail
Fill	Expand Vacancy		Temp Confirmed <input checked="" type="checkbox"/>		
Cancel	Expand Temp		Confirmed With Ivan		
Cascade Now	Expand Timesheet		Minutes Required 60		
		Move Shift	Recovery Hours 2		
			Moveable <input checked="" type="checkbox"/>		
			Secondary Agency		
			Who Temp Confirmed Ivan Baldwin		
			When Temp Confirmed 30/10/2015 12:32:25		
			Who Client Confirmed Ivan Baldwin		
			When Client Confirmed 30/10/2015 12:31:41		

Temp Desk - Shifts. If shift or plan auditing is on an Audit Trail is added.

Access to this facility is dependent on user access rights and Shift or Plan auditing being switched on. The tab is located at Temp Desk - Shifts - Audit Trail. Shift Confirmations can be audited, format - "0, 02/09/15 11:50:01, Ivan Baldwin". The 1 is a confirmation and a 0 indicates unconfirmed.

Details	Quick Fill	Short List	Cascade History	Audit Trail
When	Type	Description	Old	
30/10/2015 11:57...	SHIFT	Shift 9425 Client Confirmed edited OurRef:	0, ,	
30/10/2015 12:3...	SHIFT	Shift 9425 To edited OurRef:	09:00:00	
30/10/2015 12:3...	SHIFT	Shift 9425 Client Confirmed edited OurRef:	1, 30/10/15 11:57:57, Ivan Baldwin	
30/10/2015 12:3...	SHIFT	Shift 9425 Client Confirmed edited OurRef:	0, 30/10/15 12:31:26, Ivan Baldwin	
30/10/2015 12:3...	SHIFT	Shift 9425 Temp Confirmed edited OurRef:	1, ,	
30/10/2015 12:3...	SHIFT	Shift 9425 Temp Confirmed edited OurRef:	0, 30/10/15 12:31:53, Ivan Baldwin	

Person , Tempdesks. Adding/removing can be audited

The adding or removing of Temp Desks from a person record can be audited. Additional Temp Desks are added via Person Record - Register - Complete the form including allocating a temp desk.

The audit trail is recorded in the side bar view of the Person record.



Brenda Checkley

Reports Register Delete Search

Help Registration Report

Temp Division BR Derby

CIS (20) Known As Brenda

CIS Cards Name Brenda Checkley

Photo Available From

Documents Personal Female 36

Compliance Home Phone 01385 340033

Documents Day Phone

Compliance Mobile 07453909998

Detail E-mail Brenda@iqx.co.uk

Equal Opps Payroll Email A...

Social Media

Headline

Alert

Reg. Departments Construction* (Temp), Events (Temp), Legal (Temp)

Dept. Questionnaire Legal

Sector

Nursing Date

Date of Qualifying

Qualification Level

PIN Expiry

Area of Law

Test number for dec ...

Modify Screen Date to Count

Description	When	Login Name	Old Values	New Values	Connection ID
Desk Legal Shifts Added	06/11/2015 15:45...	IVAN	Added		1
Desk Demo - Agency 2 Legal Added	06/11/2015 15:45...	IVAN	Added		1
Desk Demo - Events Shift Co 2 Added	06/11/2015 15:40...	IVAN	Added		1
Employment History (Internal) for McViti...	06/11/2015 12:09...	IVAN		removed	1
Employment History (Internal) for McViti...	06/11/2015 12:09...	IVAN		removed	1
Employment History added (Internal)	06/11/2015 12:04...	IVAN		Added	1
Tax Code - Brenda Checkley	06/11/2015 10:52...	IVAN	489L		1
NI Letter - Brenda Checkley	06/11/2015 10:52...	IVAN	A		1
NI Updated - Brenda Checkley	06/11/2015 10:52...	IVAN	BB123456D		1

IQXNet

Authorised e-timesheet, Entered now shows the client contact who completed the timesheet

In IQXNet the timesheet has been enhanced by the inclusion of the name of the Consultant who completed the timesheet on the portal.

Period	W 201532
Dates	From 02/11/2015 to 08/11/2015
Payroll Company	1
Analysis Code	E3
Entered	02/11/2015 14:29 By Suzanne Smyth
Processing Details	

Accounts

Maintenance, Invoice Management Groups. "Tradeshift" added as a Process Method.

Timesheets will go through Batch invoice creation and invoices will not appear in Send Invoices or



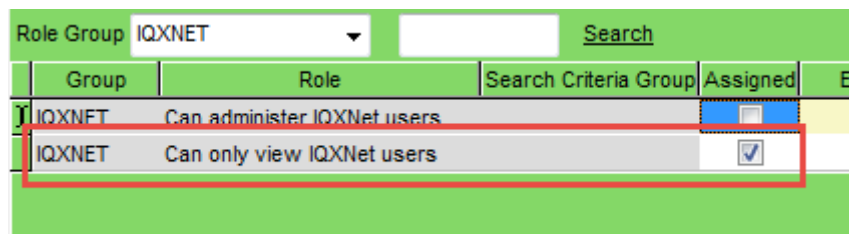
Send OB10 Invoices. Contact IQX to implement this feature.

System Administrator

View only default to see IQXNet details

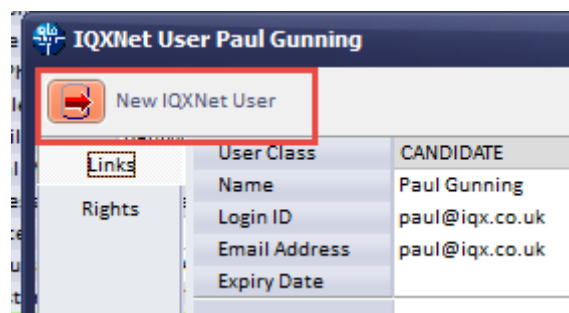
There is now a 'View only' option for IQXNet. Consultants will be able to open the record of a candidate with the IQXNet icon on their Person record but will not be able to make any changes to the record.


This function requires IQXNet and is set up in Maintenance - Users - IQXNet.



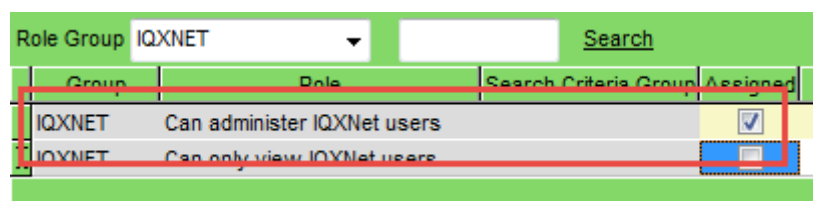
Group	Role	Search Criteria Group	Assigned	Ex
IQXNET	Can administer IQXNet users		<input type="checkbox"/>	
IQXNET	Can only view IQXNet users		<input checked="" type="checkbox"/>	

On opening the IQXNet record the Consultant will see -



IQXNet User Paul Gunning	
	New IQXNet User
Links	
Rights	
User Class	CANDIDATE
Name	Paul Gunning
Login ID	paul@iqx.co.uk
Email Address	paul@iqx.co.uk
Expiry Date	

For Comparison, a Consultant with 'Can administer IQXNet Users



Group	Role	Search Criteria Group	Assigned	Ex
IQXNET	Can administer IQXNet users		<input checked="" type="checkbox"/>	
IQXNET	Can only view IQXNet users		<input type="checkbox"/>	

will see -



Compliance Documents - Adjustment of document input configuration to change size/readability.

Compliance documents can now be adjusted to improve the size and readability of the documents.

In Maintenance - General Settings - Settings 1870 and 1880. Both input values specify the percentage of resolution and compression for compliance documents.

1870 Settings	Resolution for Compliance Document Input	72	Allows fine tuning of readability/size
1880 Settings	Compression for Compliance Document Input	75	Allows fine tuning of readability/size

New User Role - Restrict Users from seeing Temp Desk other than own

User can now be restricted from seeing Temp Desks other than their own.

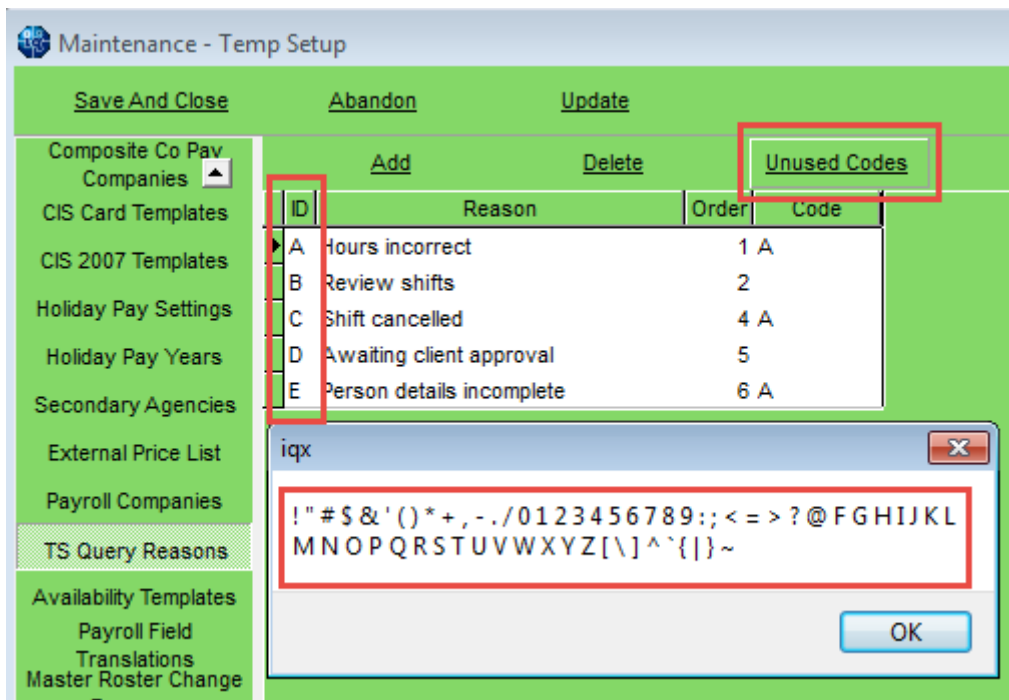
Group	Setting	Activate	Expires	Notes
USER	Hide Temp Desk other than Own	<input checked="" type="checkbox"/>		
USER	Hide Tempdesk Cascade	<input type="checkbox"/>		

The setting can be accessed via Maintenance - User - Layout Settings - Group USER - Click 'Hide temp Desk other than own'.

Maintenance, Temps, TS Query Reasons. Unused Codes Button added.

With a long list of timesheet query reasons it can be difficult to determine which ID characters are available. The Unused Codes button will display available ID Codes.

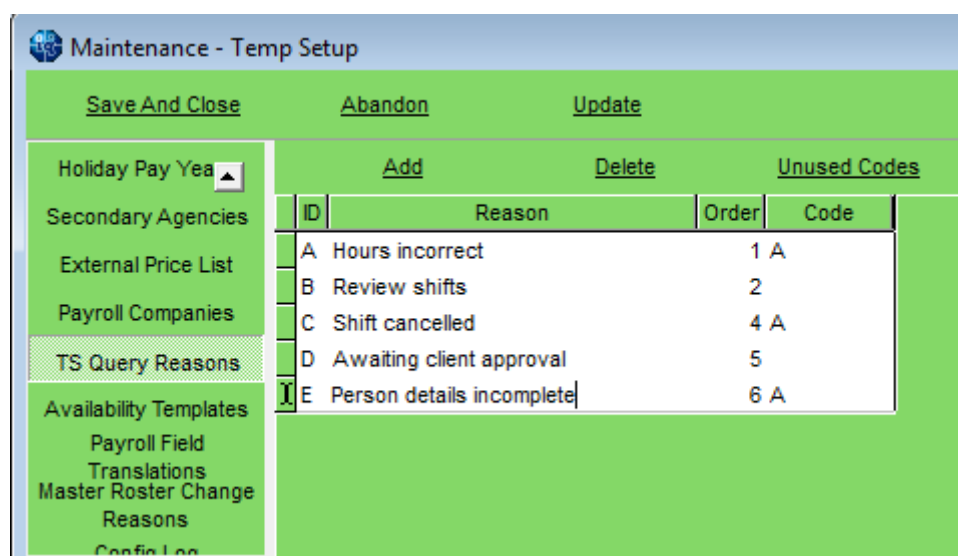
Go to Maintenance - Agency Setup - TSQuery Reasons - Unused Codes



New field 'Code' used to filter Timesheet Query Reasons

A new field has been added allowing control over the choice of reasons available to a user when querying a provisional timesheet. Querying a provisional timesheet will allow the timesheet to be referred back for corrections or further approval.

To access this feature: Maintenance - Temp Setup - TS Query Reasons - Insert selected query codes. (alphanumeric works best).



Maintenance - Users - Select User - Insert User's TS Query code.



Roles	Name	Ivan Baldwin	Branch	Nottingham
Layout Settings	Keyname	BALDWIN IVAN	Division	12345678901234567890123456
Questionnaire	Login Name	IVAN	Default Department	Drivers
Division Access	Job Title		Default Tempdesk	Demo - Construction ABC
Department	E-Mail Address	ivan@iqx.co.uk	Analysis Code	
Maintenance	Short ID	PI	Nominal Segment (m...	
Popup Escalations	Template for New Users	<input type="checkbox"/>	Report View Level	2000
Synety Setup	Not In Use	<input type="checkbox"/>	Report Print Level	2000
	Leave Date		Report Export Level	2000
	Override Form ID		Combo Box Filter	
	Startup Form	Desktop x diary	TS Query Code	A
			Inbox Limit	60

Note if the query codes are left blank both in Temp Desk setup and in the user record the user will have access to all TS Query Codes.

To set up the TS Query Log - Maintenance - General Settings - Temps - No 530 - Y.

510 Temps	Work Pattern Start Time	09	
520 Temps	Work Pattern Hours	7.5	
530 Temps	Show TS Query Log	Y	
531 Temps	Timesheet Query image Folder	C:\IQX\Timesheets\2014\BR Derby\	Must end

Temp Desk	View
Desk: Demo - Construction ABC	Weekly Shift
AWR Che...ng	Search Expand
TS Query Log	
Expiry Di...s	Name

New field ExpiryBehaviour in Tag table

This field is available for use by jobs as required. If you have a job which monitors DBS expiry this field allows the specification of what activities will happen as the expiry of the DBS approval approaches i.e. Warn Consultant, Email the Person, Block the matching of shifts.

Connection name added to Sybase for ease of debugging

The connection name column in Sybase has been developed to include more detail to help with debugging.



iqx - pears

Contents	Overview	Connected Users	Table Page Usage	Table Locks	ER Diagram	Deadloc
Conn. ID ▲		User	Conn. Name			
	1	DBA	IQXHUB			
	2	DBA	IQXHUB			
	7	pears	IQX - mhs			
	8	pears (Current)	Sybase Central 1			

Updated .dll files and themes

As a result of more PDF development another .dll is needed for JBig2 encoded PDFs. Updated .dll files can be downloaded from the FTP - file name IQX_21511_extradll.zip.

Kamri themes have been updated to standardise combo box drop down arrows. Contact IQX for advice on updating the themes.

Web Referencing

Users can now send reference requests and receive references from within IQX via the web. Referees will be able to log onto a temporary website to complete the reference which will automatically update the IQX database. This functionality requires System Administrator set up in addition to IQX set-up of the database/wpk, IQXHub and some IQXWeb functionality.

[web_referencing_setup_guide.docx](#)

From:
<https://iqxusers.co.uk/iqxhelp/> - iqx

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release_2.15.11&rev=1448283495

Last update: **2017/11/16 22:07**

