



# Release 2.15.11

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.

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## Users

### Add shifts from a Temps view.

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: Demo - Construction ABC', 'View: Weekly Shift', 'Year: 2015', 'Week: 32', and 'Ends 08/11/2015'. Below this, there's a 'Vacancies' section with a table showing 'Available', 'Unavailable', and 'On Hold' counts. The 'Add Shifts' button is highlighted with a red box. Below the 'Vacancies' section, there's a 'Temps' section with a table showing 'Temp', 'Known As', and 'Alert' status. The 'Add Shifts' button is also highlighted with a red box.

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. It has three main sections: 'Match from', 'Match', and 'Previously worked only'. The 'Match from' section has radio buttons for 'Vacancy Short List', 'Current in Temp Desk Pool', 'Specified Individual', 'Current in Department', 'Entire Temp Desk Pool', 'Secondary Agency Temps', and 'Checkley, Brenda' (which is selected and highlighted with a red box). The 'Match' section has a 'Starting' date of '02/11/2015' and checkboxes for 'Filter Temps' and 'Match Exact Grade Only'. The 'Previously worked only' section has radio buttons for 'No', 'Company', and 'Vacancy', and date pickers for 'Date from' and 'Date to'. At the bottom, there's a red box with the text 'You can drag a person HERE to match'. The form has a green footer with 'Help', '< Back', 'Next >', and 'Cancel' buttons.

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 icons and buttons: Reports, Register, Delete, Search. Below the header is a 'Help' link and a 'Registration Report' link. The main area is divided into several sections. On the left is a sidebar with a tree view containing: Temp, Contact Events, Compliance, Status, Get in Touch, Diary, Availability, Requirements, CV, Questionnaire, Perm, Accounts, and Compliance. The 'Temp' section is expanded, showing a list of fields: Division (BR Derby), Known As (Brenda), Name (Brenda Checkley), Available From, Personal (Female 36), Home Phone (01385 340033), Day Phone, Mobile (07453909998), E-mail (Brenda@iqx.co.uk), Payroll Email A..., and Social Media. The 'Personal' section is also expanded, showing: Headline, Alert, Reg. Departments (Construction\* (Temp)), Dept. Questionnaire (Construction\*), Job Title (Civil Draughtsman, Coded Welder), Key Skills, CSCS (No), CSCS Expiry, Test number for dec..., and \*\*\*Person Q'aire\*\*\* (Do not mailmerge U...). The 'Questionnaire' section is expanded, showing: Holiday Pay (D45/Leave), Awaiting NI (checked), and NI/Tax Details (NI Number: , Tax Code: , Week 1 Indicator: No). The 'Perm' section is expanded, showing: Title for Payroll (Ms), Composite Co Pay Ref, and No Holiday Pay (checked). The 'Accounts' section is expanded, showing: Composite Co Template Maintenance. The 'Compliance' section is expanded, showing: No Holiday Pay (checked).

## 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.



Company Name: McVities  
Job Title: Product design  
Please supply Dates if known  
From: 28/01/2010  
To: 12/08/2015  
Ok Cancel

Company	Job Title	Temp	External	From	To	Salary	Concurrent
Brenda Checkley							

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.

Desk: All  
From: 11/06/2008 to Today  
State: Unfilled, Confirmed, Provisional, Worked, Cancelled  
Cascade: Non-Cascadeable, Cascadeable, Cascaded  
Filter Shifts Add Shifts Bulk Cancel Unfilled

Temp	Company	Vacancy	Vac. Site	Date	From	To	Break	Description	Our Ref	Their Ref	When Entered
Brenda Checkley	Danka Business Sys...	Biscuit Cutter	RCPE	Mon 13/10	08:00	16:00	60	8 Hours			21/10/2008 12:40

## 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. [User Guide](#)

## 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.



**Temp Desk**

Desk: Social Work View: Weekly Shift Year: 2012 Week: 6 Ends 13/05/2012 (Current) Process Update Close Help

Vacancies Temps Placements Vacancy Shifts Timesheets Transfer Cascades AWR Temps

Search Expand ☒ Current Pool ☐ Entire Pool Temps to Show: ☒ All ☐ Expiring ☐ Expired and Expiring ☐ Expired Only Clear Column Filter State: All ☐ Working this week

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

All  
C Current  
P Placed  
L Client  
R Pre registration  
D Not Active  
A Secondary Agency  
N Client/Candidate  
Z Umbrella  
. Archived/DNU

## 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		
		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		
		Move Shift		

### 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

Navigation: Reports, **Register**, Delete, Search

Help Registration Report

Temp	Division	BR Derby	Headline	
CIS (20)	Known As	Brenda	Alert	
CIS Cards	Name	Brenda Checkley	Reg. Departments	Construction* (Temp), Events (Temp), Legal (Temp)
Photo	Available From		Dept. Questionnaire	Legal
Documents	Personal	Female 36	Sector	
Compliance	Home Phone	01385 340033	Nursing Date	
Documents	Day Phone		Date of Qualifying	
Compliance	Mobile	07453909998	Qualification Level	
Detail	E-mail	Brenda@iqx.co.uk	PIN Expiry	
Equal Opps	Payroll Email A...		Area of Law	
	Social Media		Test number for dec ...	

Modify Screen

Date	to	Count
Appointments	Description	When
Payroll Runs	Desk Legal Shifts Added	06/11/2015 15:45... IVAN Added
Warning	Desk Demo - Agency 2 Legal Added	06/11/2015 15:45... IVAN Added
Chat	Desk Demo - Events Shift Co 2 Added	06/11/2015 15:40... IVAN Added
Mailer Lists	Employment History (Internal) for McViti...	06/11/2015 12:09... IVAN removed
	Employment History (Internal) for McViti...	06/11/2015 12:09... IVAN removed
	Employment History added (Internal)	06/11/2015 12:04... IVAN Added
AWD Audit Trail	Tax Code - Brenda Checkley	06/11/2015 10:52... IVAN 489L
Audit Trail	NI Letter - Brenda Checkley	06/11/2015 10:52... IVAN A
	NI Updated - Brenda Checkley	06/11/2015 10:52... IVAN BB123456D

## 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.

Role Group IQXNET <input type="text"/> Search				
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 -

For Comparison, a Consultant with 'Can administer IQXNet Users

Role Group IQXNET <input type="text"/> Search				
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.

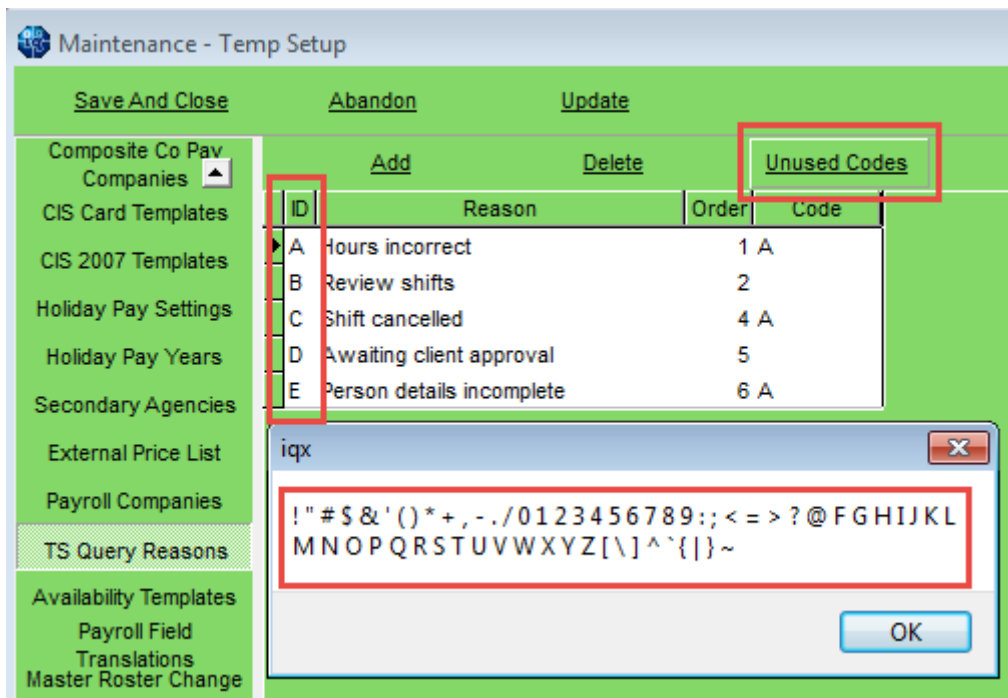
Group	Setting	Activate	Expires	Notes
USER	Hide Temp Desk other than Own	<input checked="" type="checkbox"/>		
USER	Hide Tempdesk Cascade	<input type="checkbox"/>		

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.

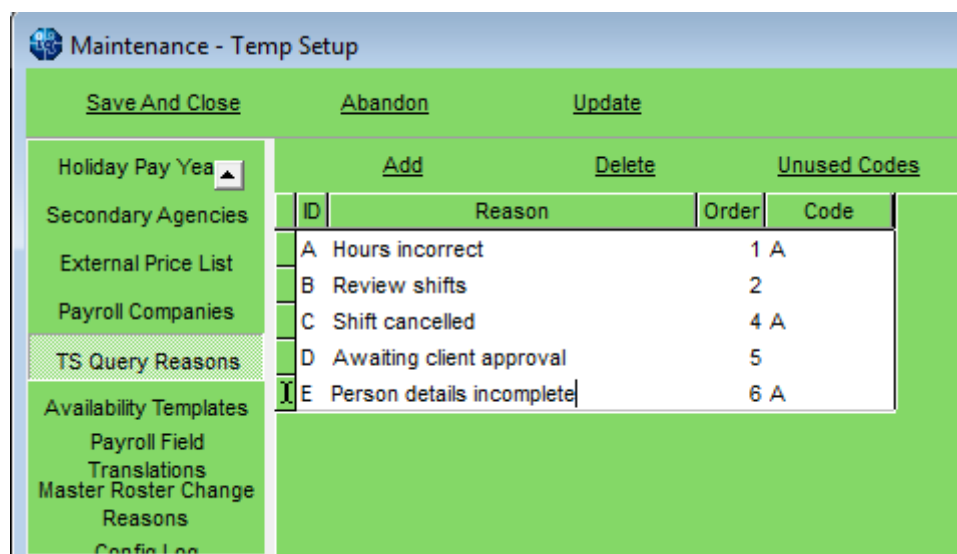
Go to Maintenance - Temp Setup - TSQuery Reasons - Unused Codes



## 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.



Name	Ivan Baldwin	Branch	Nottingham
Keyname	BALDWIN IVAN	Division	12345678901234567890123456
Login Name	IVAN	Default Department	Drivers
Job Title		Default Tempdesk	Demo - Construction ABC
E-MailAddress	ivan@iqx.co.uk	Analysis Code	
Short ID	PI	Nominal Segment (m...	
Template for New Users	<input type="checkbox"/>	Report View Level	2000
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

Desk: Demo - Construction ABC View: Weekly Shift

AWR Che... Search Expand

☒ TS Query Log

Expiry Di... 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.[Setup Guide](#)

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