



# Release 2.16.2

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.

- [User](#)
- [System Administrator](#)
- [Fixes and Enhancements](#)

## Users

### New Person Wizard - filtering of Temp Desks

In order to avoid long lists Temp Desks are now filtered according to the Users' Division Access as set in Users – Division Access and also in File - Select Division.

This feature will require System Administrator set up.

Roles	Name	Joe Bloggs	Branch
Layout Settings	Keyname	BLOGGS JOE	Division
Questionnaire	Login Name	JBLOGGS	Default Department
Division Access	Job Title	Demo Tester	Default Tempdesk
Department Maintenance	E-Mail Address	joe.bloggs@iqx.co.uk	Analysis Code
Popup Escalations	Short ID	JB	Nominal Segment (main)
Broadbean	Template for New Users	<input type="checkbox"/>	Report View Level
Audit Trail	Not In Use	<input type="checkbox"/>	Report Print Level
Own Audit Trail	Division Access: All Own Selected		
	Division	Select	
	BR Derby	<input checked="" type="checkbox"/>	
	BR Leicester	<input type="checkbox"/>	
	BR Nottingham	<input type="checkbox"/>	
	Legal Recruitment	<input type="checkbox"/>	

In addition, Defunct Temp Desks can now be hidden when completing the New Person Wizard and in the Temp Desk drop down menu.



The screenshot shows the 'Temp Desk' interface. At the top, there are three dropdown menus: 'Desk', 'View', and 'Year'. The 'Desk' dropdown is open, showing a list of options: Derby Industrial, Industrial Drivers, Leicester Ind Shifts, Leicester Industrial, and All. The 'View' dropdown is set to 'Weekly Shift' and the 'Year' dropdown is set to '2014'. Below the dropdowns, there is a 'Vacancy Shifts' button. Below this, there is a section titled 'Please tick any Temp Desks in which the Candidate will be registered'. This section contains a table with two columns: 'Temp Desk' and 'In Pool'.

Temp Desk	In Pool
Derby Industrial	<input type="checkbox"/>
Leicester Ind Shifts	<input type="checkbox"/>
Leicester Industrial	<input type="checkbox"/>
Industrial Drivers	<input type="checkbox"/>

This is activated in by your System Administrator.

## Email body text with mailmerge letter attachment

It is now possible to add email body text when sending letters as an attachment using the mailmerge function.

To use this function Person - Select candidates - Mail Merge - Select Merge Document - Open - Select Signatory where a choice is available - OK - Select which records will be used. - OK - Review each letter using the video buttons to transit between letters. - Email Where Available.



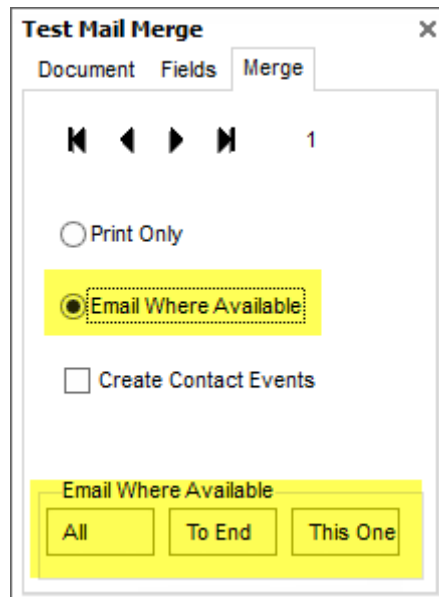
The 'Test Mail Merge' dialog box has three tabs: 'Document', 'Fields', and 'Merge'. The 'Merge' tab is selected and highlighted in yellow. It contains navigation buttons (back, forward, first, last) and a page indicator '1'. There are three radio buttons: 'Print Only' (selected), 'Email Where Available' (highlighted in yellow), and 'Create Contact Events'. At the bottom, there is a 'Print Out' section with three buttons: 'All', 'To End', and 'This One'.

Select Attachment. Without this the template and Attachment Message boxes will not be available. Select the required template (Note if Agency Setup - Branding is enabled this will show all templates from within the 'MAILMERGEATTACHMENT' Brand.). Insert the attachment message. Click OK.

The 'E-Mail' dialog box shows the 'Subject' field with 'Test'. The 'Attachment Message Text' section has a 'Template' dropdown menu (highlighted in yellow) with a list showing 'TEMPNOTIFICATION TEST1'. Below this is a large text area for 'Insert your message here'. The 'Attachments' section has a 'CV(s)' checkbox and 'Letter as' options: 'Plain text', 'HTML', and 'Attachment' (selected and highlighted in yellow). There are 'File', 'Document', and 'Remove' buttons. A 'Files and Documents' file explorer is visible. At the bottom, a red box highlights the 'Print Selection : 1 out of 4 without Email Address' section, which contains three radio buttons: 'Send or Print All' (selected), 'Send those with Address (ignore others)', and 'Print those without Address (ignore others)'. The 'Include IQX Signature' checkbox is checked. 'Ok' and 'Cancel' buttons are at the bottom right.



Email Where Available at the bottom of the next window. Choose from All/To End/This One. Clicking one of these buttons will send the emails and attachments.

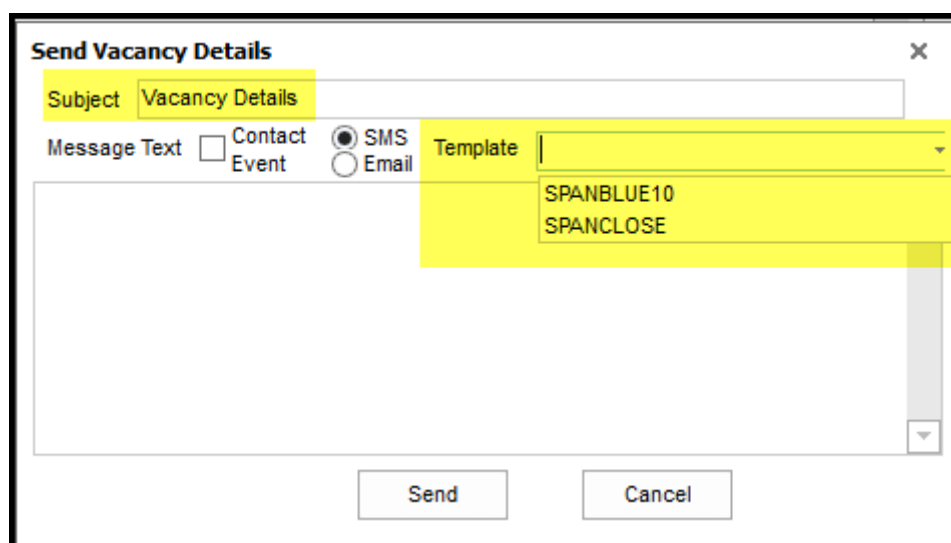


## Send Details - Modifiable Email subject

If set up to send details from Vacancy - Shortlist and Person - Progress the subject line can now be modified and defaults to Vacancy Details.

A template drop down menu has also been added allowing the use of templates when sending details.

In Person - Progress or Vacancy - Short List select a record and click Send Details.



If Agency Setup Branding is enabled and there is a brand called 'PROGRESSSENDDetails', the template descriptions will appear in the drop down list. If no Branding for PROGRESSSENDDetails not



set up, then the boilerplate 'contact event' descriptions will appear. If required 'PROGRESSSENDDetails' will require System Administrator set up.

If SMS is ticked the subject is ignored and does not count towards the character count

## Broadbean candidate CV retrieval by ranking

Broadbean functionality has been extended in IQX to allow Users to retrieve CVs according to Broadbean's ranking. Users can retrieve CVs ranked Suitable, Unsuitable, Maybe Suitable, Unranked or All. This ranking uses the same naming convention as the Broadbean site.

Once a vacancy has been posted via a job board the Broadbean icon will have a red tick in it. Select this icon. In the next window select Candidates - Retrieve Candidates and select the ranking. Results which have been ranked by Broadbean will be displayed. The rank of each result is shown in the rank column.

See IQX for full details on setting up and using Broadbean.

**Broadbean : Temp Vacancy: Operator for 3I Group PLC**

Buttons: Delete Advert, Advert Check, New Advert, Update, Close, Please Wait....

Advert - Checkdate :

LocationPath	Industry	Create Time	Close Time	Description	Reference	Title	Type	Salary Ben
	Building & Construc	26/01/2016 1		This is not a	Test1	Operator	Contract	Plentiful training

Channels: Candidates

Buttons: View CV, Import Candidate and add to shortlist, Retrieve Candidates, Candidate

Name	Forename	Surname	Salutation	Address	Street	Town	Postcode	Email	Phone	App. Time	Rank	Channel Name	Imported	ShortListed
Brittany Spiers							2 7JR	ivan@iqx	0115 981 4675	26/01/2016 1	Unranked	Jobs Cabinet (Test Board	<input type="checkbox"/>	<input type="checkbox"/>
Karen Howes							12 8J	jbloggs@	0208 675 1234	26/01/2016 1	Unranked	Broadbean Test Board	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Candidate Rank**

Rank

- All
- Unranked
- UnSuitable
- MaybeSuitable
- Suitable

## New Candidate - Duplicate Check

When registering a new candidate IQX checks for and suggests possible duplicate candidates at the end of the first window and once the New Person wizard is completed. It checks name (> 70%), date of birth, email and postcode. It is now possible to modify the duplicate candidate check to ignore duplicate postcodes which will result in more possible duplicates.

This will require System Administrator set up.



## Web Referencing

Web Referencing has now been extended to allow Agency Setup Branding to be applied to emailed Reference Requests.

This functionality relies on set up by IQX staff in conjunction with System Administrators. An updated User Guide is available here. [User Guide](#)

## Accounts

### New switchable vat rates

It is now possible to add 5% and 10% VAT rates to the company form where the application of these rates are permitted by HMRC.

This feature will require System Administrator set up.

Once set up the additional rates can be seen in Company - Miscellaneous - VAT Status drop down menu.

Questionnaire	Credit Limit	
Notes	Days Credit	14
Extra Notes	Group Timesheets on Invoice	One invoice for each Timeshee
Group Tree	Invoice Frequency	Weekly
	Company Reg. No.	
	VAT Number	
Miscellaneous	Invoice This Record Address	<input checked="" type="checkbox"/>
Accounts	Invoice Address	36 George Street, EDINBURGH
Documents	Currency	
	On Stop	<input type="checkbox"/>
Temp Details	E-Timesheets	<input type="checkbox"/>
Location Map	VAT Status	Standard
Company	Not Ltd. Company	Standard
WebSite	ERNI on Invoice	Exempt
Cascade Rules	Timesheet Contact	5 %
	Invoice E-mail	10 %
Audit Tr <input type="checkbox"/>	Statement E-mail	

## System Administrator

### New Person Wizard - filtering of Temp Desks

Defunct Temp Desks can now be hidden when completing the New Person Wizard.

To set this feature go to Maintenance - General Settings - Temps - No 850 and set to Y.



## Send Details - Modifiable Email subject

When sending details from Vacancy - Shortlist and Person - Progress the subject line can now be modified and defaults to Vacancy Details.

A template drop down menu has also been added allowing the use of templates when sending details.

Progress State Codes for Details Sending must be populated in Maintenance - General Setting - Settings - No 87. Progress State Codes can be obtained from Maintenance - Agency Setup - Progress States.

In Person - Progress or Vacancy - Short List select a record and click Send Details.

If Branding is enabled and there is a brand called 'PROGRESSSENDDetails', the template descriptions will appear in the drop down list. If no Branding for PROGRESSSENDDetails not set up, then the boilerplate 'contact event' descriptions will appear. If required 'PROGRESSSENDDetails' will require System Administrator set up.

## New Candidate - Duplicate Check

When registering a new candidate it is now possible to modify the duplicate candidate check to ignore duplicate postcodes, which will result in more possible duplicates.

This is set up in General Settings - Settings - 1920 - Ignore Postcode in Duplicate Check - Y.



The screenshot shows the 'General Settings' window. The 'Group' dropdown is set to 'Settings'. The table below shows a single entry:

No	Group	Name	Value	Notes
1920	Settings	Ignore Postcode in Duplicate Check	Y	Person / Company Duplicate Check. Default includes

## New switchable vat rates

It is now possible to add 5% and 10% VAT rates to the company form where the application of these rates are permitted by HMRC.

To ensure the additional rate are visible Maintenance - General Settings - Accounts - No 60 should be set to N.

The screenshot shows the 'General Settings' window. The 'Group' dropdown is set to 'Accounts'. The table below shows a single entry:

No	Group	Name	Value	Notes
60	Accounts	Restrict Company Miscellaneous to ...	N	Restricts access to the Miscellaneous view on the

and Extra VAT Types for Accounts should be set to Y.

The screenshot shows the 'General Settings' window. The 'Group' dropdown is set to 'Accounts'. The table below shows a single entry:

No	Group	Name	Value	Notes
450	Accounts	Extra Vat Types for Accounts	Y	If 'Y', adds in the extra vat types to the picklist

Once set up the additional rates can be seen in Company - Miscellaneous - VAT Status Drop down menu.

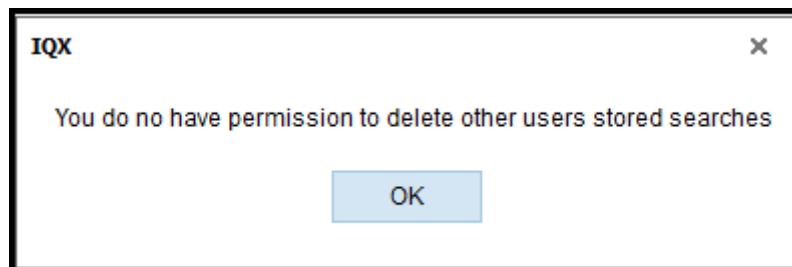




Questionnaire	Credit Limit	
Notes	Days Credit	14
Extra Notes	Group Timesheets on Invoice	One invoice for each Timesheet
Group Tree	Invoice Frequency	Weekly
	Company Reg. No.	
Miscellaneous	VAT Number	
	Invoice This Record Address	<input checked="" type="checkbox"/>
Accounts	Invoice Address	36 George Street, EDINBURGH
Documents	Currency	
Temp Details	On Stop	<input type="checkbox"/>
	E-Timesheets	<input type="checkbox"/>
Location Map	VAT Status	Standard
Company	Not Ltd. Company	Standard
WebSite	ERNI on Invoice	Exempt
Cascade Rules	Timesheet Contact	5 %
	Invoice E-mail	10 %
Audit Tr	Statement E-mail	

## Deletion of Stored Selections and Searches

Managers can now restrict stored selection and search deletion to the users' own stored selections and searches. If a User attempts to delete searches created by other users the following warning will appear.



Only Users with Manager rights will be able to delete any stored searches and selections via the Manager switch in Maintenance - Users Roles - General - Manager.

Joe Bloggs					
Save and Close Abandon Update No Password Delete Help Reports					
Roles	Name	Joe Bloggs	Branch	Leicester Office	
Layout Settings	Keyname	BLOGGS JOE	Division	Legal Recruitment	
Questionnaire	Login Name	JBLOGGS	Default Department	Construction	
Division Access	Job Title	Demo Tester	Default Tempdesk	Demo - Construction ABC	
Department	E-Mail Address	joe.bloggs@iqx.co.uk	Analysis Code		
Maintenance	Short ID	JB	Nominal Segment (main		
Popups Escalations	Template for New Users	<input type="checkbox"/>	Report View Level	999	
Broadbean	Not In Use	<input type="checkbox"/>	Report Print Level	999	
Audit Trail	Role Group	All	manager	Search	
Own Audit Trail	Group	Role	Search Criteria Group Assigned	Expires	Notes
	GENERAL	Manager	<input checked="" type="checkbox"/>		Is able to over-ride selected validation checks



Deletion of stored searches and selections is now audited.

Joe Bloggs

Save and Close Abandon Update No Password Delete Help Reports

Roles	Name	Joe Bloggs	Branch	Leicester Office
Layout Settings	Keyname	BLOGGS JOE	Division	Legal Recruitment
Questionnaire	Login Name	JBLOGGS	Default Department	Construction
Division Access	Job Title	Demo Tester	Default Tempdesk	Demo - Construction ABC
Department	E-Mail Address	joe.bloggs@iqx.co.uk	Analysis Code	
Maintenance	Short ID	JB	Nominal Segment (main	
Not In Use	Template for New Users	<input type="checkbox"/>	Report View Level	999
Not In Use	Not In Use	<input type="checkbox"/>	Report Print Level	999

Broadbean Date: 09/02/2016 to 09/02/2016 Count

Description	When	Old Values	New Values	Connection ID
Delete Candidate Stored Search Global Vacancy Default Construction	09/02/2016 16:51			29

Own Audit Trail

Database Diagnostics

IQX licences in use: 1 Refresh Close

Engine Window: Current Previous Failed Starting 09/02/2016

Audit Trail Expand User Disconnect User Message To Users Export / Archive Count

Serial No.	Login Name	Login Time	Logout Time	Failure Reason	Network Address	Connection Name	Connection ID	Client Machine	Details
2168	jbloggs	09/02/2016 12:50			192.168.0.160	IQX - jbloggs	29	TEST1	IQX Login Details - Login Name: jbloggs, 2.1

Tools Table Details

## Web Referencing

Web Referencing has now been extended to allow Branding to be applied to emailed Reference Requests.

This functionality relies on set up by IQX staff in conjunction with System Administrators. For reference a Setup guide has been included. [Setup Guide](#)

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

Permanent link:  
[https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release\\_2.16.2&rev=1516203616](https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release_2.16.2&rev=1516203616)

Last update: **2018/01/17 15:40**

