



# Release 2.16.4

**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

#### Alternative top right view on vacancy

Switchable Extra Notes can now be added to the Vacancy top right view so that users have 2 notes fields.

In the Vacancy form the button Switch Job Desc takes you to the Job Description view and Switch Extra Notes takes you to the Extra Notes view.



This can be set up by your System Administrator.

#### Export XLS files (jobrunner) with Landscape Orientation

Data exported to an Excel spreadsheet, whilst using Job Runner, can be set to display the information in Landscape format. This is particularly useful for jobs where an Excel spreadsheet is sent to the Candidate to print out timesheets. An extra piece of code needs to be added to an xml job.

Contact IQX to have this facility included in your Xml jobs. This may be chargeable.

#### Shift confirmation email/sms - (without Branding)

When sending shift confirmations by email and SMS it is now possible to use other boiler plate text



(BPT) in addition to {SHIFTDETAILS} e.g. {VC\_POSITION} {VAC\_SITENAME}.

Contact your System Administrator to add additional BPT.

## User switch to block editing rates on Vacancy

Where a user is allowed to either maintain schemes or override pay or charge rates is now possible to block changes to the vacancy rates. This feature becomes active once a placement is made against the vacancy.

This feature will need System Administrator set up.

## Make Registration Number Read only

It is now possible to make Person record registration numbers read only.

In the Person record the registration number will be displayed in grey.

Consultant	VRS
Registered	No. 10039
Number	10039
Date	
Last Updated	23/10/2015 14:04

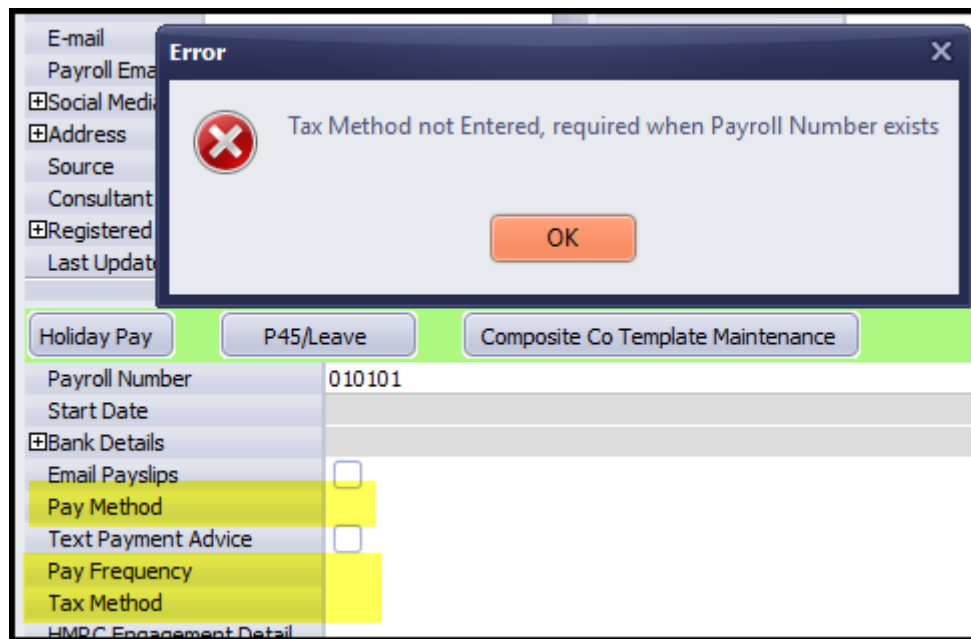
This requires System Administrator set up.

## Person payroll validation checks on Pay Freq/Method & Tax Method

New candidates without Tax Method, Payment Method or Pay Frequency will default to PAYE/BACS and Weekly on completion of their first timesheet.

Applicant	
Payroll No.	
Pay Method	BACS
Tax Method	PAYE
Pay Freq.	Weekly
Date of Birth	03/06/1986
NI Number	

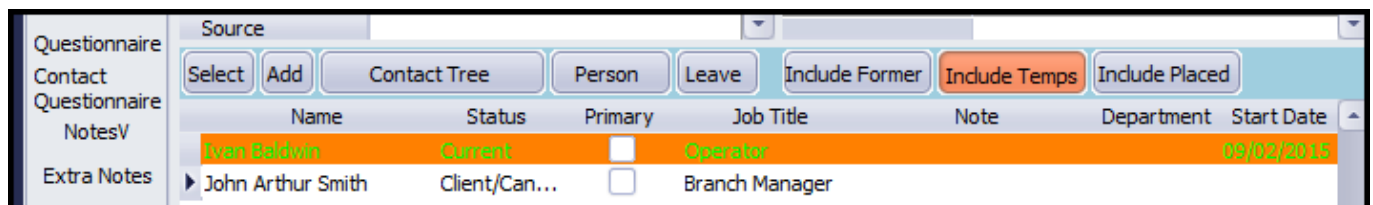
Once a candidate has been issued with a payroll number validation checks will be carried out on the Person record to ensure that they have these fields completed and the Person record cannot be saved without these fields completed.



## Company contact view changes

In the company contact view it is now possible to show Temps by default.

It is possible to temporarily switch this view off using the **Include Temps** button.



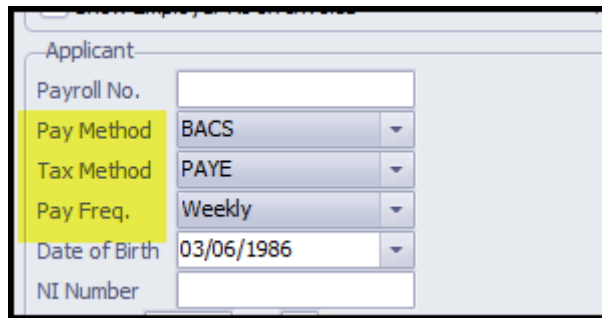
Font and background colours are assigned to different person states the colours will be visible in the company contact view.

Some System Administrator set up is required.

## Accounts

### Person payroll validation checks on Pay Freq/Method & Tax Method

New candidates without Tax Method, Payment Method or Pay Frequency will default to PAYE/BACS and Weekly on completion of their first timesheet.



Applicant

Payroll No.

Pay Method

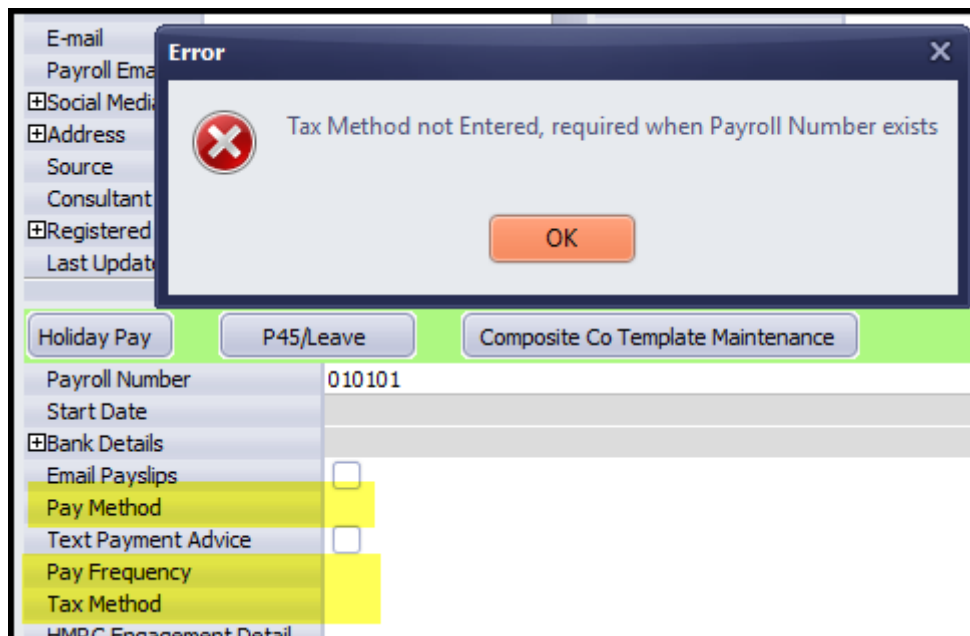
Tax Method

Pay Freq.

Date of Birth

NI Number

Once a candidate has been issued with a payroll number validation checks will be carried out on the Person record to ensure that they have these fields completed and the Person record cannot be saved without these fields completed.



E-mail

Payroll Email

Social Media

Address

Source

Consultant

Registered

Last Update

Holiday Pay

P45/Leave

Composite Co Template Maintenance

Payroll Number 010101

Start Date

Bank Details

Email Payslips ☐

Pay Method

Text Payment Advice ☐

Pay Frequency

Tax Method

HMRC Engagement Detail

**Error**

Tax Method not Entered, required when Payroll Number exists

OK

## User switch to block editing rates on Vacancy

Where a user is allowed to either maintain schemes or override pay or charge rates is now possible to block changes to the vacancy rates. This feature becomes active once a placement is made against the vacancy.

This feature will need System Administrator set up.

## Standardise Accord payslip viewing, add date filter

A date filter has been added to the Accord payslip view.

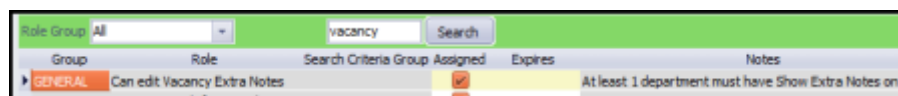


# System Administrator

## Alternative top right view on vacancy

Switchable Extra Notes can now be added to the Vacancy top right view so that users have 2 notes fields.

This is set up in - Maintenance - User Roles - Can edit Vacancy Extra Notes.

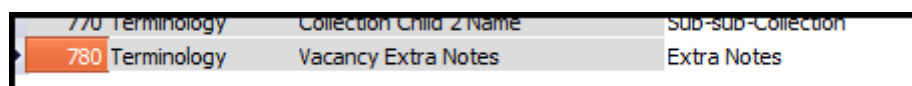


Role Group	Role	Search Criteria Group	Assigned	Expires	Notes
GENERAL	Can edit Vacancy Extra Notes		<input checked="" type="checkbox"/>		At least 1 department must have Show Extra Notes on.

Departments need to be set up to show extra notes via Maintenance - Agency Setup - Departments

Branches	<div><div>Add</div><div>Delete</div><div>Help</div></div>							
Divisions	<div><div>Applicant Questionnaire</div><div>Vacancy Questionnaire</div><div>Placement Questionnaire</div><div>Reference Questionnaire</div><div>Timesheet</div></div>							
Departments								
Document Templates	ID	Department	Searchable	Division	Analysis Code	Publish To Web	Sort Order	Show Extra Notes
	0	Null	<input type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>
Document Types	DR	Drivers	<input checked="" type="checkbox"/>			<input type="checkbox"/>		<input checked="" type="checkbox"/>
Phone Types	HE	Health	<input checked="" type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>
			<input type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>

The Extra Notes title can be amended in Maintenance - General Settings - Terminology - No 760.

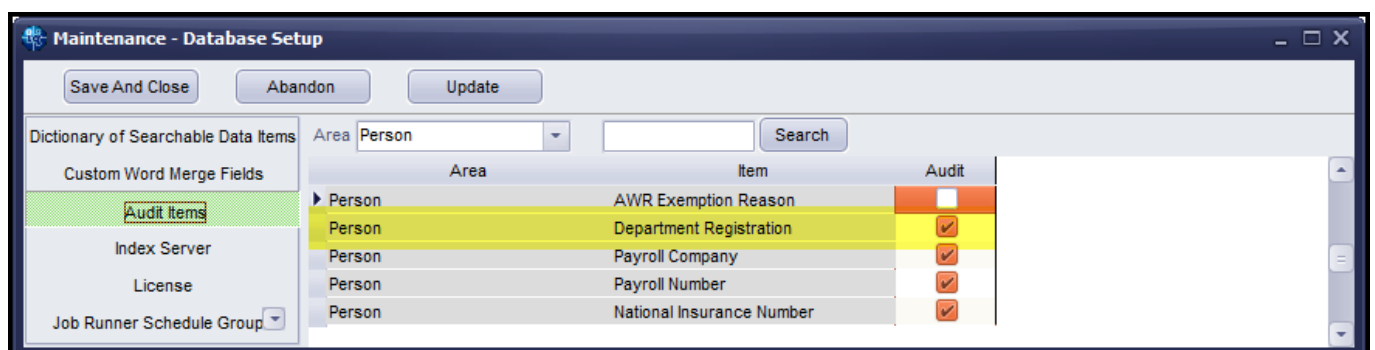


ID	Terminology	Collection Child 2 Name	Sub-sub-Collection
760	Terminology	Vacancy Extra Notes	Extra Notes

## Audit changes to department registration

Changes to Department registration can now be audited.

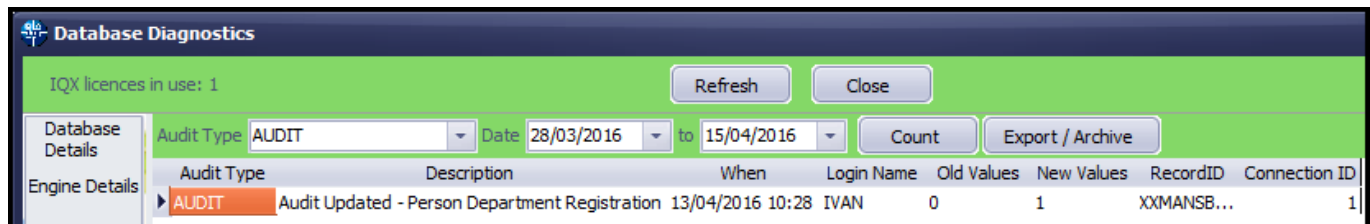
In Maintenance - Database Setup - Audit Items - Area - Person Pay - click the tick box.



Area	Item	Audit
Person	AWR Exemption Reason	<input type="checkbox"/>
Person	Department Registration	<input checked="" type="checkbox"/>
Person	Payroll Company	<input checked="" type="checkbox"/>
Person	Payroll Number	<input checked="" type="checkbox"/>
Person	National Insurance Number	<input checked="" type="checkbox"/>



Any changes to department registration will appear in Maintenance - Database Diagnostics - Audit Trail - AUDIT



The screenshot shows the 'Database Diagnostics' window. It has a green header bar with 'IQX licences in use: 1', 'Refresh', and 'Close' buttons. Below the header, there are filters for 'Audit Type' (set to 'AUDIT'), 'Date' (28/03/2016 to 15/04/2016), 'Count', and 'Export / Archive'. A table below shows the audit trail data.

Audit Type	Description	When	Login Name	Old Values	New Values	RecordID	Connection ID
AUDIT	Audit Updated - Person Department Registration	13/04/2016 10:28	IVAN	0	1	XXMANSB...	1

## Export XLS files (jobrunner) with Landscape Orientation

Data exported to an Excel spreadsheet, whilst using Job Runner, can be set to display the information in Landscape format. This is particularly useful for jobs where an Excel spreadsheet is sent to the Candidate to print out timesheets. The code used to facilitate this is (in bold)

```
<ExportFile filename="{TempDir}Timesheet.xls" excelfontname="Arial" excelfontsize="9"
breakpoint="no" excelorientation="landscape">
```

If the orientation isn't set xls defaults to portrait.

Contact IQX to have this facility included in your Xml jobs. This may be chargeable.

## Shift confirmation email/sms - (without Branding)

When sending shift confirmations by email and SMS it is now possible to use other boiler plate text in addition to {SHIFTDETAILS} e.g. {VC\_POSITION} {VAC\_SITENAME}.

## User switch to block editing rates on Vacancy

Where a user is allowed to either maintain schemes or override pay or charge rates is now possible to block changes to the vacancy rates using a switch in Maintenance - General Settings - Temps - 1010.

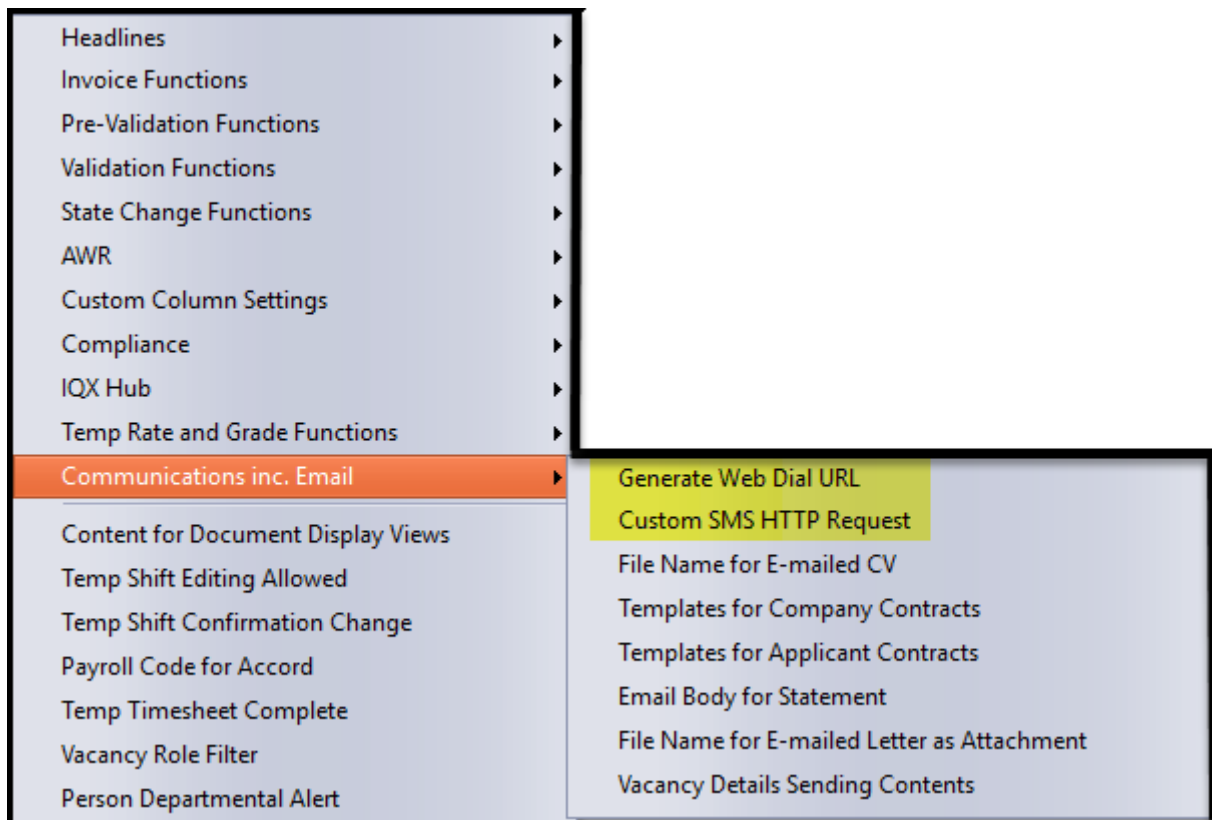
1000 Temps	Show Shift (Our Ref) button on Main	N
1010 Temps	Block editing Rates on Vacancy	Y

This feature becomes be active once a placement is made against the vacancy.

## New Database Functions - GenerateWebDialURL() and CustomSMSHTTPRequest()



New functions have been added to Maintenance - Database Functions - Communications inc. Email.



Please contact IQX to have these functions modified. This may be a chargeable activity.

## Make Registration Number Read only

It is now possible to make Person record registration numbers read only.

In General Settings - Settings - No. 1980 - Make Registration Number Read only - Y will make registration number read only.

1970 Settings	Vacancy Rates Holiday Pay Descrip...
1980 Settings	Make Registration Number Readonly Y

In the Person record the registration number will be displayed in grey.

Consultant	VRS
<input type="checkbox"/> Registered	No. 10039
Number	10039
Date	
Last Updated	23/10/2015 14:04



## Company contact view changes

In the company contact view it is now possible to show temps by default in Maintenance - General Settings - Settings - No 1251 - Y.

1251 Settings	Inc Temp Applicants in Contact List	Y	Controls whether Temp candidates appear by default in the Company Contacts list
1440 Settings	Initial Temp Vacancy state	C	

In addition font and background colours assigned to different person states will now be visible in the company contact view. These are set up in Maintenance - Agency Setup - Person States.

Maintenance - Agency Setup										
Save And Close Abandon Update										
Branches Divisions Departments Document Templates Document Types Phone Types Boiler Plate Text E-mail Signatures Contact Event Types Contact Event Outcomes Sources Company States Person States Vacancy States	Add Delete Unused Codes Background Colour Font Colour									
	Code	Name	Order	Grid Order	Note	Publish To Web	Set On Web	Background Colour	Font Colour	On Fo
	I C	Current	1	1	Currently looking for w...	<input type="checkbox"/>	<input type="checkbox"/>	33023	65280	
	P	Placed	2	2	Placed	<input type="checkbox"/>	<input type="checkbox"/>	16777215	0	
	L	Client	3	3	Client	<input type="checkbox"/>	<input type="checkbox"/>	16777215	0	
	R	Pre registration	4	4	Added - not enough d...	<input type="checkbox"/>	<input type="checkbox"/>	15588575	-1	
	D	Not Active	6	6	Deleted	<input type="checkbox"/>	<input type="checkbox"/>	16777215	0	
	A	Secondary Agency	10	10	Secondary Agency Temp	<input type="checkbox"/>	<input type="checkbox"/>	16777215	0	
	N	Client/Candidate	11	11	ljkh	<input type="checkbox"/>	<input type="checkbox"/>	16777215	0	
	Z	Umbrella	20	20	Umbrella improt tests	<input type="checkbox"/>	<input type="checkbox"/>	16777215	0	
	.	Archived/DNU	99	99	Deleted	<input type="checkbox"/>	<input type="checkbox"/>	16777215	0	

It is possible to temporarily switch this view off using the **Include Temps** button.

Questionnaire Contact Questionnaire NotesV Extra Notes	Source									
	Select Add Contact Tree Person Leave Include Former Include Temps Include Placed									
	Name	Status	Primary	Job Title	Note	Department	Start Date			
	Ivan Baldwin	Current	<input type="checkbox"/>	Operator			09/02/2015			
	John Arthur Smith	Client/Can...	<input type="checkbox"/>	Branch Manager						

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Last update: 2017/11/16 22:07

