



# Release 2.17.10

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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## User

### Thumbnail photo on the button bar of the Person form

A thumbnail of the photo stored in Person – Photo can now be displayed on the top right hand of the Person form for ease of viewing when videoing through candidate records.

Sana Acevedo

Navigation buttons: Back, Forward, Home, Search, Reports, Register, Delete, Search, Data Management

Help Registration Report Data Access Report Data Management

Temp	Division	International	Headline	
Contact Events	Known As	Sana	Alert	
Get in Touch	Name	Sana Acevedo	Reg. Departments	Industrial (Perm+Temp), Financial Services (Perm)
Diary	State	Current	Dept. Questionnaire	Industrial
Shifts	Available From		Position Sought	
Shift Progress	Personal	Male 34	Salary wanted	
Availability	Home Phone	01632 931 813	Key Skills	Food
Requirements	Day Phone		HGV Licences	
CV	Mobile	07700 996 930	Fork Lift Truck	
Perm	E-mail	Sana_Acevedo@iqx.co.uk	Tests Completed	
Accounts	Social Media		Safety Gear	
Compliance				

Thumbnail photo of Sana Acevedo

Max size 256Kb for reports

Load from File

Copy from Clipboard

### New Column on Expiry Dates View - Shifts After Expiry

A new column has been added to the expiry dates view called 'Shifts after Expiry'. This column shows the number of shifts booked after the first expiry date. This has been designed to assist with booking future shifts before a candidate has been re-cleared on the expectation that the clearance will happen in time.



Temp Desk

Desk: Demo - Construction ABC View: Weekly Shift Year: 2017 Week: 25 Ends 24/09/2017

Go to Current Make Current Process Update Close Help

AWR Tel Search Expand

Temp to Show: ☒ All ☐ Expire and Expiring ☐ Expiring ☐ Expired Only

Clear Column Filter State: All Working this week

Name	alert	Days before Expiry	Shifts after Expiry	CSCS Expiry Lead 30	Kit Nos Date Ex Lead 30	DBS Expiry Lead 60	Visa Expiry Lead 60
Frankie Kidd		-35	11	19/09/2017			

## Pop Up Reminders adding other staff

In addition to adding staff when creating a reminder, it is now possible to add or remove staff at the point when the reminder pops up.

Appointment / Reminder

Popup Again: 5 Copy Delete

At: [Dropdown]

Consultant: IVAN Priority level: 5

Popup Notification: 0 Minutes Beforehand

Date / Time: Thu 26/10/2017 11:59 Recur every: 0 days

Description: 2.17.10

Duration: ☒ Reminder (no duration) 0 Minutes Hours Days Weeks

Links: Company Person

Unlink

Other Staff: DEMO

Add Remove

Consultant: [Dropdown] Ok Cancel

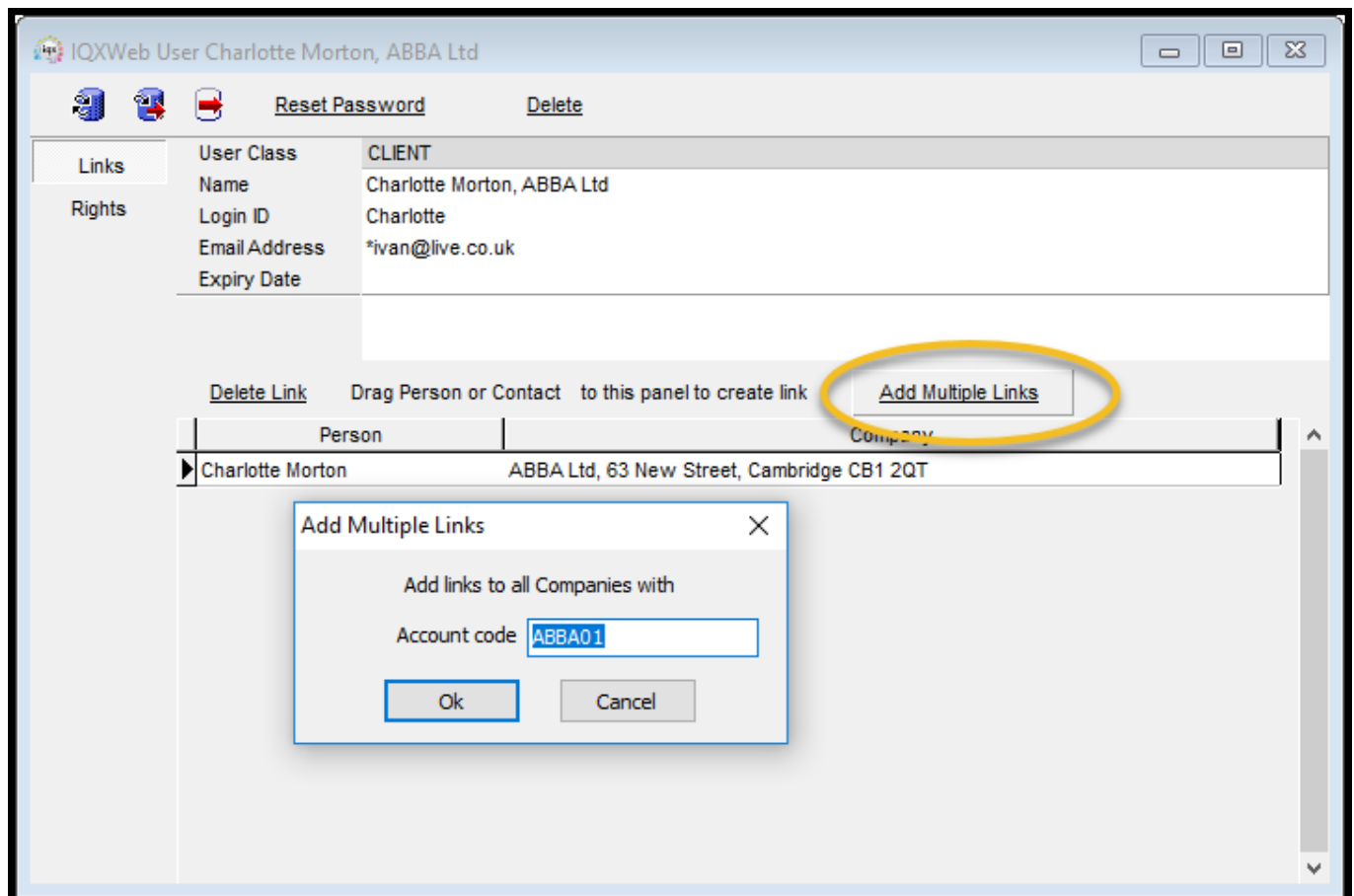
Note: Users need to click the Popup Again button again to get a subsequent popup.

## Company - IQXWeb - way to Link Head Office to Group Companies

Where there are multiple companies in a group using the same account code and a head office contact needs to see data from all companies a way of adding links to all in one action now exists in the iqxWEB record on the company contact record.



Clicking 'Add Multiple Links' will allow the user to enter an account code and link all companies to the iqxWEB record. This will save time with companies that have a significant number of subsidiaries. An employment record will be added to each company record with a Note of 'Web User Link'. Use the Delete Link button to remove a company; the employment record will also be deleted unless contact events exist.



## Company - Contact Department

This field has been changed to enable the user to select from a drop down as well as entering free text thereby saving time and ensuring uniformity of spelling. This is similar to vacancy position.



ABBA TAXIS

Navigation: Reports, Delete, Help

**Sales** | Division: Infrastructure

**Contacts** | Name: ABBA TAXIS

**Contact Events** | Address: 63 New Street, Cambridge, CB1 2QT

**Who's Interested Ranged** | Phone:

**Activity Sales** | Account Code: 530

**Questionnaire** | Invoice Address: 63 New Street, Cambridge CB1 2QT

**Notes** | Alert:

**Mailer Lists** | State: Prospect

**Documents** | Sales State:

**Stored Selections** | Consultant:

**Select** | **Add** | **Contact Tree** | **Person** | **Leave** | **Include Former** | **Include Temps** | **Include Pl**

Sales Consultant: All

Name	Status	Primary	Job Title	Sales Consultant	Note	Departn
Danny Austin	Client	<input type="checkbox"/>	Programmer			

Consultant

Requires System Administrator setup.

## System Administrator

### Thumbnail photo on the button bar of the Person form

A thumbnail of the photo stored in Person - Photo can now be displayed on the top right hand of the Person form for ease of viewing when videoing through candidate records.

To activate the thumbnail image set General Setting - Group of Settings - 3040 to Y.

Note if Person - Photo has been hidden in Modify Screen the thumbnail will not display.



## Division filtering on Notifications

In Agency Setup - Notifications it is now possible to assign divisions to Notifications. Leaving the Divisions field blank means the Notification is available for all divisions.

Selecting a Division means the template will be available to a user if they are in All or the associated division.

2-17-10-b.png Note:- Each division needs to have a separate notification template allocated to it if the same template is to be used for more than one division. Alternatively leaving the division field blank allocates that notification to all divisions.

## Company Contact add Departmental Questionnaire

In Agency Setup - Departments new Company Contact departmental questionnaire has been added.

ID	Department	Searchable	Division	Analysis Code	Publish To Web	Sort Order	Show Extra Notes
AA	Construction	<input checked="" type="checkbox"/>	Infrastructure	D1	<input checked="" type="checkbox"/>	20	<input checked="" type="checkbox"/>
ED	Education	<input checked="" type="checkbox"/>	Support	E1	<input checked="" type="checkbox"/>	30	<input checked="" type="checkbox"/>
MS	Events	<input checked="" type="checkbox"/>	Support	D2	<input checked="" type="checkbox"/>	40	<input checked="" type="checkbox"/>
FS	Financial Services	<input checked="" type="checkbox"/>	Corporate	B1	<input checked="" type="checkbox"/>	50	<input checked="" type="checkbox"/>

Display of the questions is based on the user's department.



Name	Status	Primary	Job Title	Sales Consultant	Note	Departm
Danny Austin	Client	<input type="checkbox"/>	Programmer			

## Company - Contact Department

This field has been changed to enable the user to select from a drop down as well as entering free text thereby saving time and ensuring uniformity of spelling. This is similar to vacancy position. The field description is set in General Settings - Terminology 830 - Company Person Department Name.

The department names are set up in Agency Setup - Contact Department

Name	Order	Department (Blank for all)
Tester1	Construction	



The choices displayed in Company- Contact right-hand view is limited to the user's department.



## Composite Company Template Maintenance Update

Composite Company Template Maintenance has been updated to bring into line with other approaches such as adding Departments to Shift Order Reasons.

### In Temp Setup - Composite Co Pay Companies

To set up a new template:

1. Use Add to start a new template.
2. Use the arrow buttons to set the fields to be included.
3. Use **Next** → to open the form where you add the values.\

List Temps will open the person selector and display a list of all temps that are associated with that template.

To modify an existing template, use the arrow buttons to add new fields the use Next to add information to the new fields.

The screenshot shows the iqx software interface. At the top, there is a menu bar with options: Reports, Register, Delete, Search. Below this, there is a sub-menu with: Help, Registration Report, Data Access Report (highlighted), and Data Management. The main area displays a form for a person named Sana Acevedo. The form is divided into several sections: Temp, Contact Events, Get in Touch, Diary, Shifts, Shift Progress, Availability, Requirements, and CV. The 'Temp' section shows 'Division: International'. The 'Contact Events' section shows 'Known As: Sana', 'Name: Sana Acevedo', 'State: Current', and 'Available From:'. The 'Diary' section shows 'Personal: Male 34'. The 'Shifts' section shows 'Home Phone: 01632 931 813', 'Day Phone: 07700 996 930', and 'Mobile: 07700 996 930'. The 'Availability' section shows 'E-mail: Sana\_Acevedo@iqx.co.uk'. The 'Requirements' section shows 'Social Media'. The 'CV' section shows a photo of Sana Acevedo. On the right side of the form, there are fields for 'Headline', 'Alert', 'Reg. Departments' (Industrial (Perm+Temp), Financial Services (Perm)), 'Dept. Questionnaire' (Industrial), 'Position Sought', 'Salary wanted', 'Key Skills' (Food), 'HGV Licences', 'Fork Lift Truck', 'Tests Completed', and 'Safety Gear'. At the bottom right, there is a note: 'Max size 256Kb for reports' and buttons for 'Load from File', 'Copy from Clipboard', and 'Compliance'.

**Next** → opens the form where you add the values to the selected fields.



Maintenance - Temp Setup

Save And Close Abandon Update

Demo Template Help List Temps Add Disconnect Delete Next ->

Select Composite Co

Excluded		Included
Bank Reference	>	Company Name
HMRC Engagement		Bank Name
VAT Registered		Bank Sort Code
VAT Number		Bank Account Name
Pay Co Reference		Bank Account Number
Supplier Code	>>	Pay Method
Email		Pay Frequency
		Tax Method
		Registration Number
		Payroll Address
		AWR Exemption Reason
	<	
	<<	

Payroll Years  
Temp Desks  
Pay Bands  
Rate Scripts  
Rate Schemes  
Holidays  
Shift Types  
Shift Templates  
Shift Template Groups  
Timesheet Cancel Reasons  
Shift Cancel Reasons  
Shift Order Reasons  
Shift Progress States  
Unavailability Reasons  
Miscellaneous Settings  
Composite Co Pay Companies  
CIS Card Templates

Apply will update any changes to the records using the template.

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