



Release 2.17.4

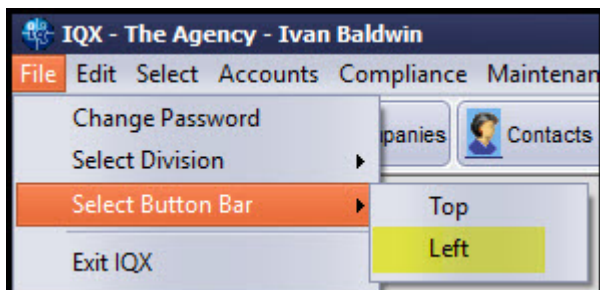
Note: If you have custom forms defined in IQX, not all new features may be available to you. Your agency custom forms are shown on Help – About.

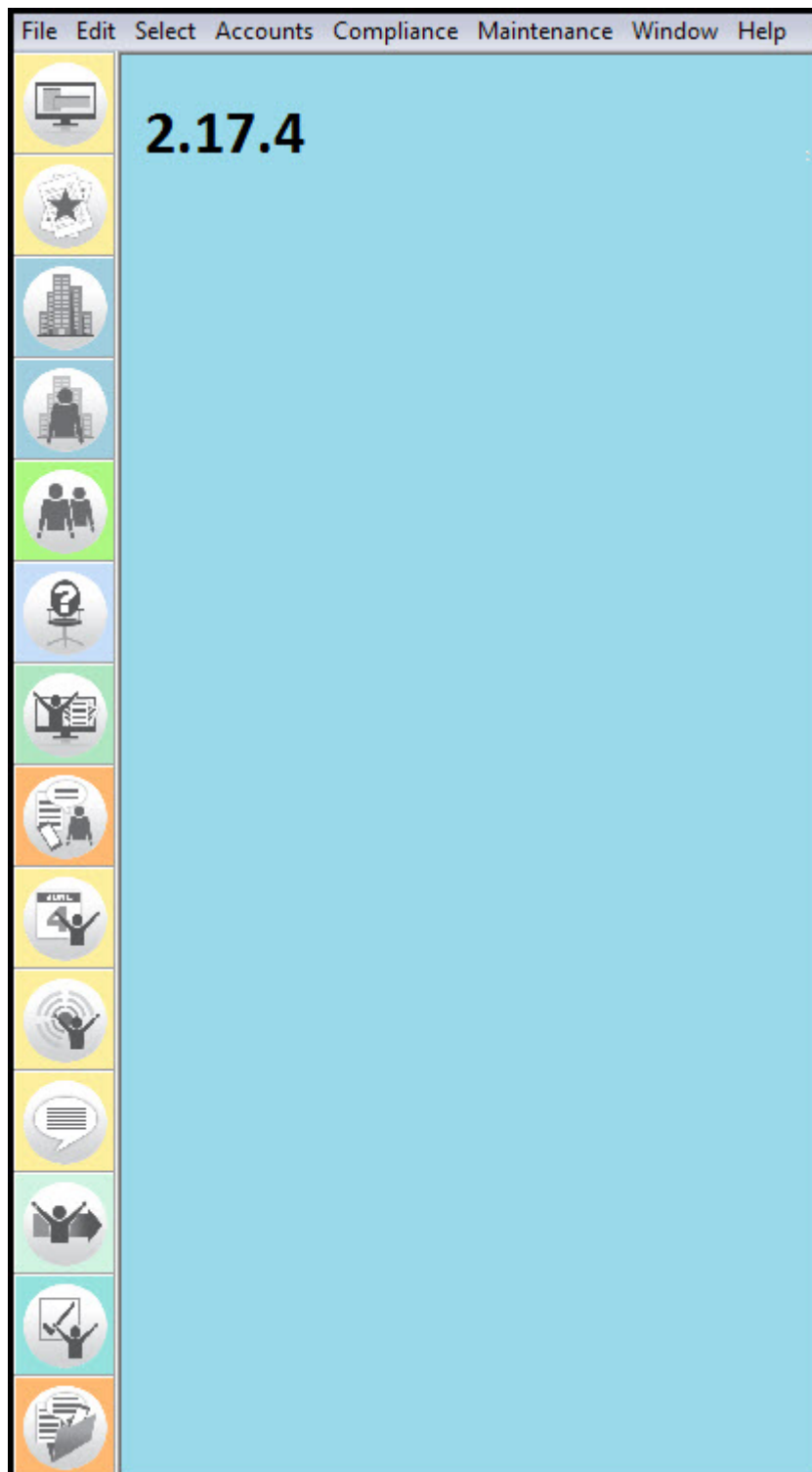
New Features

Users

Alternative IQX button bar - left position and new icons

An alternative IQX button view has been set up in IQX to give the User more flexibility arranging their view of IQX. A User will be able to switch the button bar between the existing horizontal top view and the new vertical left view, according to personal preference.





This feature requires System Administrator set up.

Completed Timesheet - new line to show Tax Method & IR35 Status

A new line has been added to completed timesheets showing the tax status of the Candidate and IR35 status where their Tax Status is Ltd/Umbrella or Self Employed.



Requires System Administrator set up.

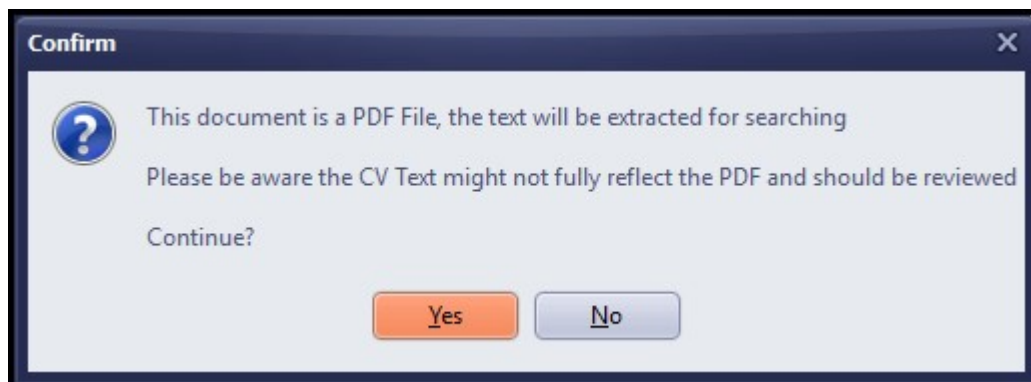
Line No.	Description	Unit	Units Paid	Pay Rate	Amount Paid	Units Charged	Charge Rate	Amount Charged	Grade AWR?	Ltd?
1	Standard	Hours	25.50	18.25	465.38	25.50	22.50	573.75	N	

Converting pdf CVs into CV text

It is now possible to use CVs in PDF format. The text will be extracted and added to 'CV TEXT'. This can be used for searching or inserting into CV template to create a formatted CV.

You can create a candidate from a PDF CV using load CV or dragging and dropping the file onto IQX.

Click yes at the next view. Note the CV Text might not fully reflect the PDF and should be reviewed.



Custom columns on Temp Desk

There are now three custom columns available on Temp Desk. These can be added to Temp Desk: Vacancies, Temps, Vacancy Shifts, Shifts, Placements and Timesheets.

Job Title	TheirRef	Last Shift2	refcode	Company
Driver		05/03/2017	2063	A & M Stephens
Bricklayers	VHS01	05/03/2017		Premier Inn
FLT		01/01/2017		Premier Inn

Requires System Administrator set up.

Compliance Document Improvements

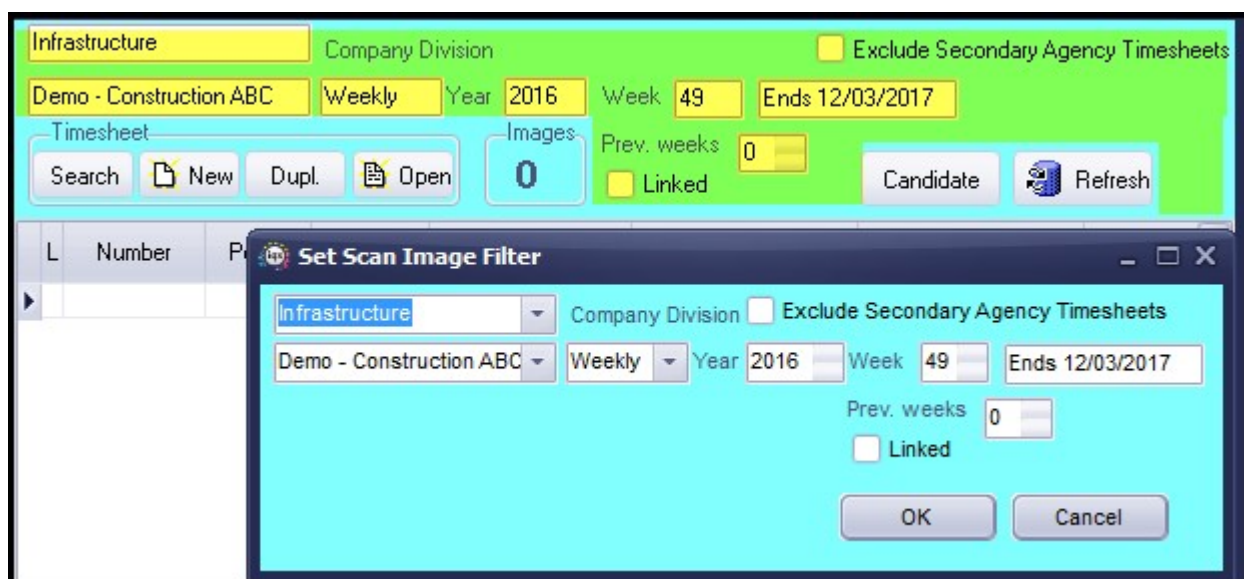
A colour scheme has been added to Compliance documents (red - archived, blue - redacted and black - current). Compliance documents can now be added using the Add button and selecting the relevant document.

When a document has been added, or amended the view will automatically refresh to display the change.

Web Reference	Expand	Add	Redact	Archive/Unarchive	Questions	Delete	Show Archived	Show Details
Placements	Description							
Withholds	Penelope Alexander Qualification		Qualification	PDF	R	<input type="checkbox"/>	<input type="checkbox"/>	
History	Penelope Alexander Qualification		Qualification	PDF	O	<input type="checkbox"/>	<input type="checkbox"/>	
Payroll	Penelope Alexander Contract		Contract	PDF	O A	<input type="checkbox"/>	<input type="checkbox"/>	
	Penelope Alexander Qualification		Qualification	PDF	O A	<input type="checkbox"/>	<input type="checkbox"/>	

Timesheet Image improvements

A new dialogue box has been added to filter timesheets in Accounts - Timesheet Image Linking.



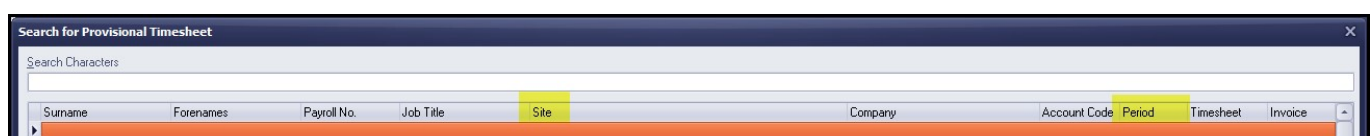
The screenshot shows the 'Set Scan Image Filter' dialog box. The dialog has a title bar 'Set Scan Image Filter' and a close button. Inside, there are several fields and checkboxes:

- Infrastructure** (selected in a dropdown)
- Company Division** (checkbox, unchecked)
- Exclude Secondary Agency Timesheets** (checkbox, unchecked)
- Demo - Construction ABC** (selected in a dropdown)
- Weekly** (selected in a dropdown)
- Year 2016** (selected in a dropdown)
- Week 49** (selected in a dropdown)
- Ends 12/03/2017** (text field)
- Prev. weeks 0** (text field)
- Linked** (checkbox, unchecked)
- OK** and **Cancel** buttons at the bottom.

This will increase speed of forms as you set multiple filters at once then apply them.

If 'LINKED' is ticked, the cursor now stays at the same timesheet allowing additional docs to be attached as required, after linking.

In the Search dialogue, additional columns have been added, Site and Period.



The screenshot shows the 'Search for Provisional Timesheet' dialog box. It has a title bar 'Search for Provisional Timesheet' and a close button. Inside, there is a search bar and a table with columns:

Surname	Forenames	Payroll No.	Job Title	Site	Company	Account Code	Period	Timesheet	Invoice



A new button has been added to go directly to the Candidate from Timesheet Image Linking.

Timesheet Image Linking - Saving rotated timesheet images

It is possible to rotate and save new position from within IQX. The saved position is kept when invoicing.

Availability - open an automatic Contact Event

If you have an automatic contact event created when entering candidate Availability/Unavailability/Holiday it is now possible for the Contact Event to automatically open so that additional information can be added.

Requires System Administrator set up.

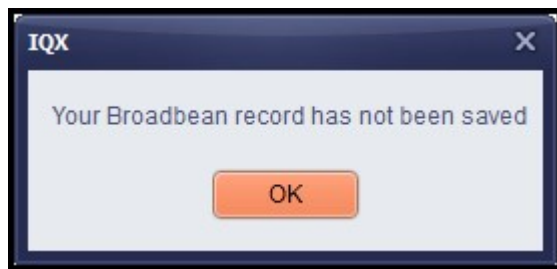
Withholding

Withholding has been reviewed to draw together all information on Person/Company/Vacancy withholding into a new view on each form Withholds. Refer to [Withholds](#) for more information.

Broadbean - Retention of advert details

When pressing the FINISH button on the IQX Broadbean form whilst posting a job to Broadbean, the following message is shown:

If user selects NO,



they will be taken back to the advert page in IQX to allow them to amend and use 'SEND ADVERT' button.

If Cancel clicked at any time the advert will be lost.

System Administrator

Bankscan

Bankscan.dll Sort Code and Account Number checking is no longer supported by the third party that has provided it. In the near future we will stop sending out the monthly dll updates as they will not be available.

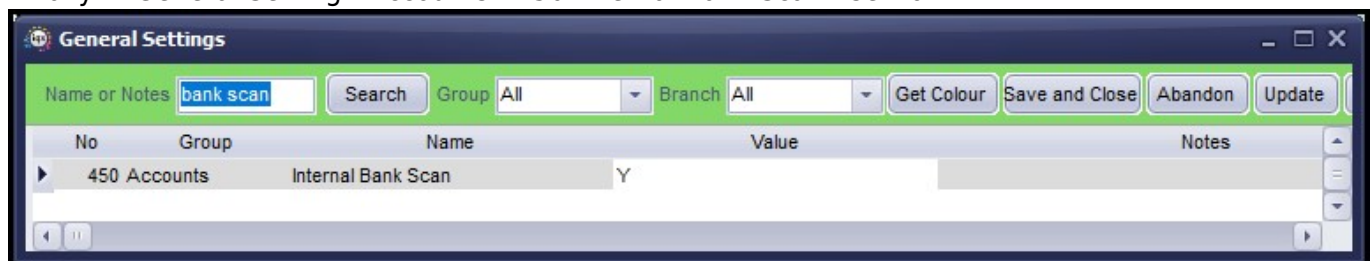
We have developed an internal mechanism that enables checking of Sort Code and Account Numbers.

For IQX versions 2.17.4 **The corrected release is 2.17.8** onwards the new method can be used.

Contact IQX support for the ImportBankScan_Modulus.xml job and run that to set up the data from valacdos.txt.

In addition set up the Add_SortCode_Overwrite.xml job to add future sort codes. The addition is audited.

Finally in General Setting - Accounts - 450 Internal Bank Scan - set to Y.



If a sort code or account number is warned as Not Valid, but is correct, it is still possible for users to contact IQX for an override code, as previously.

Alternative IQX button bar - left position and new icons

Turn on the alternative button bar in General Settings - Switchable Fields 2860.



2000 Switchable Fields	Delete in bulk on Diary List		
2860 Switchable Fields	Show Alternative Menu	Y	If Yes then Show the menu on the left, if yes show the menu on the top

A User will be able to switch the button bar between the existing horizontal top view and the new vertical left view, according to personal preference.

Timesheet Image Improvements

A new validation function has been added in Database Functions – Pre-Validation Functions – Timesheet Image Link Pre-Validation. T

Database Functions	Headlines	
Run a Job	Self Bill Functions	
SQL Tool	Invoice Functions	
SQL Tool (non-modal)	Pre-Validation Functions	Vacancy Pre-Validation
Database Diagnostics	Validation Functions	Placement Pre-Validation
Broadbean	Change Functions	Temp Shift Pre-Validation
IQXWeb Setup	AWR	Timesheet Pre-Validation
	Custom Column Settings	Temp Shift Plan Pre-Validation
	Compliance	CV Sending Pre-Validation
	IQX Hub	Timesheet Image Link Pre-Validation

Compliance Documents - Created Date

In Compliance - Compliance Documents it is now possible to have the file created date added to the file details in IQX instead of the date the file was added to IQX. This function is switchable using General Settings - Settings 2090.

2080 Settings	Disable editing of Person Phones fields	Y	Can't
2090 Settings	Use File Creation Date for Compliance Documents	Y	

Custom columns on Temp Desk

Additional custom columns are available on Temp Desks. Please contact Support for changes to Temp Desk custom grid column function.

Additional custom columns are activated by setting the required number in General Settings – Temps – 1110. The default value is 1.

1100 Temps	Show rate margin on placement by ...	1	
1110 Temps	Number of Custom Columns on the ...	3	Default to 1. Max 3.



Make telephone numbers Read Only on front candidate page

It is now possible to make the telephone number, email address and social media contacts on the Person view, Read only. They will only be editable in the 'Get in Touch' view.

General Settings - Settings 2080 Disable editing of Person Phones Fields set to Yes

2070 Settings	Desktop Tracked vacancies State	X	Vacancy state code eg C
2080 Settings	Disable editing of Person Phones fields	Y	Can still be edited via the Get In Touch View
2090 Settings	Use File Creation Date for Compliance Docume	Y	

Completed Timesheet - new line to show Tax Method & IR35 Status

A new line has been added to completed timesheets showing the tax status of the Candidate and, where their Tax Status is Ltd/Umbrella or Self Employed, the IR35 status of the timesheet. The status depends on if overrides have been ticked in the related Vacancy, Placement or Company record.

Contact Support for a revised Temp Timesheet Complete function.

Self Bill Invoice										
Comment										
AWR Involved										
Tax Status	Status - Ltd Co/Umbrella IR35 - Taxable									
<div>Add</div> <div>Totals :- Units Paid - 25.50 Units Charged - 25.50 Amount Paid - 465.38 Amount Charged - 573.75</div>										
Line No.	Description	Unit	Units Paid	Pay Rate	Amount Paid	Units Charged	Charge Rate	Amount Charged	Grade AWR?	Ltd?
1	Standard	Hours	25.50	18.25	465.38	25.50	22.50	573.75	N	

Availability - user switch to open an automatic CE

Set General Settings - Temps 439 to Y and ensure General Setting - Temps 440 has a relevant contact event code.

General Settings

Name or Notes

notifi

Search

Group

Temps

Branch

All

Get Colour

Save and Close

Abandon

Update

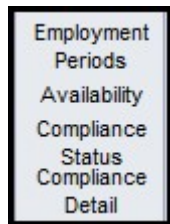
No	Group	Name	Value	Notes
439	Temps	Open Availability Notification Contact Event	N	Requires 440 below to have a val
440	Temps	Availability Notification Contact Event Type Code	AN	
441	Temps	Notification Contact Event Type Code	20	

Accounts Role - Viewing Availability View and Compliance Overview

Account Role Users can now see Candidate Availability and Candidate Compliance Status in the

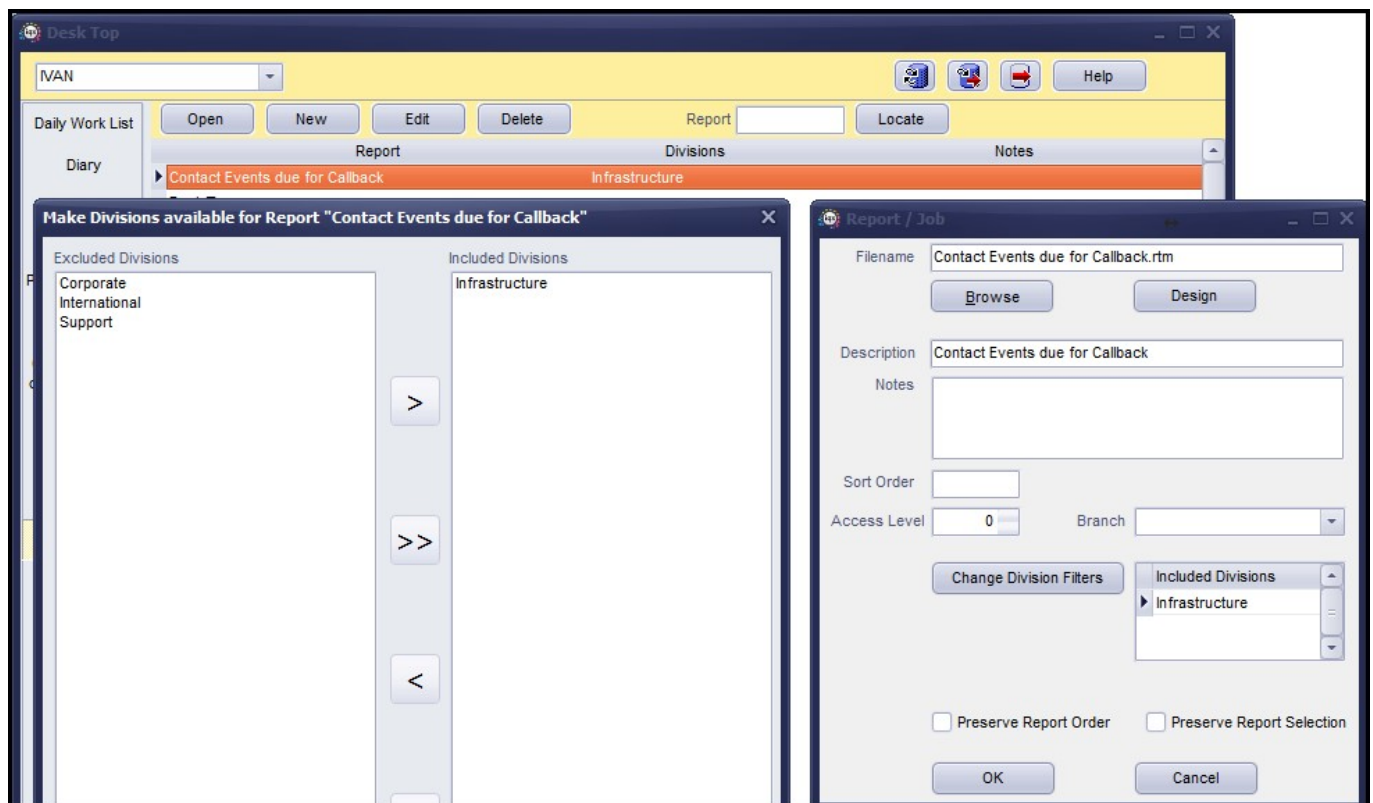


Person Record.



Division Filtering on Reports

All reports can now be filtered by Division. Select a report and click Edit. Click Change Division Filters and exclude/include the required Divisions. The included Divisions are shown in the divisions column next to the report description.



For new reports first add the report filling the required information and after saving go through the process described above.

Audit Broadbean advert creation

Completing or aborting a Broadbean advert is automatically audited in the Vacancy and Database Diagnostics - Audit Trail.



2024/05/06 11:09

10/10

Release 2.17.4

Description	When	Login Name	Old Values	New Values	Connection ID
Broadbean Advert Created	11/04/2017 16:56:06	IVAN		XX1AUBIB110420170...	4
Broadbean Advert - User Aborted	11/04/2017 16:55:55	IVAN			4
Launched Broadbean web site for this v...	11/04/2017 16:53:00	IVAN		http://www.adcourier....	4

Ability to save Stored Searches in Users

Searches made in Maintenance - Users can now be stored.



Saving a stored search is the same as for any current search. Create a search - Select Stored Searches - Save (as per other stored searching).

WPKmaintain

A new version of wpkmaintain.exe is available and will work with old releases of iqx. Please contact IQX for further information.

Updated dll package

An updated dll package has been produced to add in the latest ssl dlls and zlib1.dll. Please contact IQX for further information.

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

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release_2.17.4&rev=1504858568

Last update: 2017/11/16 22:08

