

# **Release 2.18.11**

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.

- Features
- Enhancements
- System Administrator
- Fixes

# **FEATURES**

# Person|Notes can now be indexed searched.

It is now possible to carry out a boolean search within the notes view of a candidate record, the matching word is coloured red on the returned records. Consultants can switch between searching in the CV Text and the Notes section.

Select Persi	10				
Eryname or Nu	mber *	Pind New	PastNew	Close Help	Guick Lookup
Selection	Criteria	Hirts Clear Department N	Kursing · Perm Temp	Etter Search	
Search	Text Search	Applicant Notes - Thur	nan resources" or "HR"		2
Stored Selections	Allat		Are al:		
Alan Arms	trong				
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Notes	State	Current	* Bes Departments	Numino (Perm-Term)	
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Perm	A wealth of Hum	an Resources experience, los	sking for a new challenge. Well pr	resented with excellent communication	on skills.
Accounts					
Compliance					

This search is also available when adding requirements to a vacancy and searching for candidates for a vacancy.

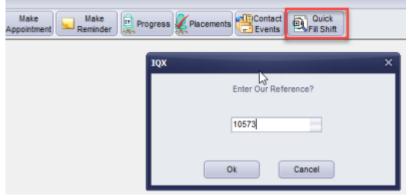
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Short List	Job Title HR Admin	
Requirements	No. of Posts 1	
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This is extremely useful for Agencies who use the notes fields for general information not covered by the questionnaire.

# **Quick Fill Shifts Button.**

If set up by your system administrator a new button will be visible on the button bar which will allow you to search for shifts by reference/serial number.



If the shift is unfilled the shift filler will launch allowing you to fill the shift.

A HCA at Alchemy Partners LLP		- 🗆 ×
Match from Vacancy Short List Current in Temp desk Pool Specified Individual Current in Department Entire Temp Desk Pool Secondary Agency Temps	Filter Temps	Previously worked only
Help	< Back Next	Cancel

If this feature would assist you please speak to your System Administrator.

## Placements now visible for Sales Consultant Role.

Users with the Sales Consultant role now have an additional view on the left hand side for Placements.



Sales	Division		Lifesteaf No	rsing			ElContact							ŀ			
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Who's	ESocial Media						Direct Phone										
Interested	Account Co		524 (Invoice)				Mobile										
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Sales	Alert						Direct Fax										
Questionnaire Notes/V	State		Client				Job Title										
	Sales State					-	Department	NEW						Ŀ			
Mailer Lists	Expand		Applicant	Process	Count	0	urrent Temp of	w) (	Process T	irmpa 🛛	f ifter						
Documents	Consultant		Contact	Applicant	Job Title	R	mp From		To	Pay	Charge	Margin	OurR	ŧ.			
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Placementa																	
30																	

This view lists the placements and each one can be expanded to assist the Sales Consultant when making their business development calls.

#### Ability to add a Reminder when Adding Withhold.

When entering a withhold it is now possible to add a reminder at the same time, useful if you want to review the withhold after a period of time.

Consultants should use the green reminder button to the right of the screen with the withhold selected and the links to the company and contact will be made.

			Appointment / Reminder	×
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Sales	Division	Litiesleaf Nursing		
	Name	ICX.		E
Consultant	⊞Address	Wester Newhouse, Lille		
Contacts	EPhone		Consultant SHELLEY • Priority Invel	
Contact Events	El Social Media		Popup Netification 0 Minutes - Beforehand	
Contact Events	Account Code	524 (Invoice)		
AWR	Invoice Address	Wester Newhouse, Lille	Date / Time Sun 09/12/2018 21:22  Recur every days	
AWR Closures	Alert		Description IOX, Viola Scott Shelley Hunter	
	State	Client	Duration 🛞 Reminder (no duration)	
Vacancies	Sales State		A LIGHT ON AN AND AN AND AN	•
Progress	Add to Note	Expand Applicant	Minutes Hours Days Weeks	
Placements	Applica	ant Registratio	Links Company XXX, Vola Scott	
Werholds	Shelley Hunter	19613	Unink Person Shaley Hunter	
Questionnaire				
NotesV			Other Staff	
Extra Notes			Add	
Group Tree				
Miscelaneous			Remove	
Accounts			*	
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Temp Details	4 0			

#### Bulk CV import now accepts PDFs.

When using the bulk CV import functionality it is now possible to bulk import CVs in a PDF format. The process is the same as for Word CVs. It should be noted that the readable text will be added to the CV and the file will be added to documents but the CV will still need to be written and formatted.

#### Source available as a field on Bulk CV Import.

When users are doing a Bulk CV Import source is now available as a field to complete.

4/9

#### 2024/04/16 04:34

🕲 Bulk CV Impoi	t _□X
Import	
State	Pre registration
Division	Melrose Nursing
Consultant	SHELLEY
Department	Nursing
Permanent	
Temp	
Source	*

This is particularly useful and time saving for consultants who are importing CVs following a marketing campaign.

#### Amendments to Broadbean when adding new candidates.

When importing a new candidate from a Broadbean application to IQX it is now possible to highlight fields and right click to select which field you wish to complete (the same process as when adding a candidate from a CV).

Once the wizard has been completed the Person form will open so that consultants can complete the questionnaire ensuring information can be completed at an early stage for faster future searching.

#### Ability to drag link a record to an unlinked email in the IQX Inbox.

When an email which has no link to an IQX record is opened you can now drag either a person from the person selector or a company contact from the company record onto the 'IQX Contact' field in the top section and it will offer to save the email address to the dragged record and make the link.

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	н	4 <b>F</b> H		Close	
	From Lin	kedin Notifications	E-mail Address	messages-nore	ply@linkedin.com
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Ľ	Subject Sh	elley, see what's new on Lir	ikedin	Received	08/12/2018 02:30
	in			Shelley Hu	nter 🌘 🥤
	Select Perso	on			
	Keyname or Nu	mber T	Find	New	Fast New
	Selection	Current Applicants Only	+ Expand	Count	Update Filter
	Search	Name	State	Last Contact	Division
	Stored Selection	Lilah Tanner Harvey Tapia	Current	26/07/2016	IQXHealthcare Melrose Nursing





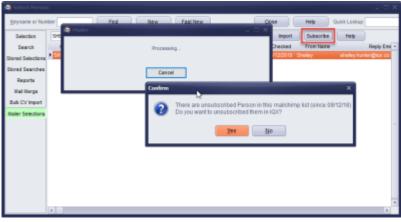


There is text in the box when no contact exists which explains this.

# Managing MailChimp Unsubscribers.

When a recipient unsubscribes from a Mail Chimp mailer it is now possible to pull this information back in to IQX.

On the Mailer Selections view consultants can press the subscribe button for each list and a message will appear informing the consultant how many people have unsubscribed on that list and giving them the option to update the persons marketing status in IQX. Details of which individuals have subscribed can be found in Mail Chimp.



# Linked Contact can be made from an open provisional or completed timesheet.

Context sensitive Make contact, Make appointment and make reminder buttons will work fully with timesheets and provisional timesheets.

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Shifts up to	1706/2018				Add Shifts Delete S	hit Cancel Shift			
Our Ref.	Date	from To	(Nims) Hours	Pay Bill Gr	nede AWR? Ltd? Their Ref.	Note Shift		Client Note	A
10566	Wed 13/06/2018	06:00 14:0	00 60 7.00	🗷 📈 A	N N	í.		5	a Show Yours
10567	Thu 14/06/2018 PH 15/06/2018	05:00 14:0	👌 Contact Ev	ent Simon Po	nce Placement as HCA	land 2 for ABC Cont	ract	Services Watlard	
10569	Sat 16/06/2018 Sen 17/06/2018	06:00 14:0			🖌 Reports Dek				Vacancy
			Text	Person	Sitten Pence		4	C15imon	
				Company	ABC Contract Services W	atford, Helody Jones		Mobile	97769 080808
			Questionnaire	Vacancy	#CA Bend 2			E-mail	Sinon_Pance@loxdemo.ca.uk
			EnelLog	Placement	Temp 11/06/2018 to 12/06	2918		Home E-mail	Sinon Pance@loxdemo.ca.uk
				Hade By	SHELLEY			Melody	
				Date	09/12/2018			ABC Contract Ser	
				Time	21.52				

Users simply need to have the timesheet or the provisional timesheet open and use their preferred method for making a contact event, appointment or reminder.

### **Timesheet Dispatch Improvements.**

It is now possible to clear timesheet dispatch details by Client Code to enable consultants to clear



details in bulk rather than individually if they need to re-dispatch for a particular client.

Dispatch Dispatch	
09/12/2018 EM 09/12/2018 EM Clear Dispatch Details (single) Clear ALL Dispatch Details Clear Dispatcher Details by Accord	ount Code

#### Shift Description added to provisional timesheet.

When completing a provisional timesheet the Shift view shows the shift Description.

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### Invoicing now accepts jpg timesheet Images.

When linking images to timesheet jpg file type is now supported.

### Invoices won't be created if no Access to Folders.

Access to invoice and timesheet image folders is now checked before authorisation takes place and if a connection cannot be established invoices are not created and an error message is produced.

### Adding records to other users stored selection.

Users with Manager role can now add records to another users Stored Selection.

### Skype.

IQX can integrate with Skype, please contact IQX Support to discuss further.

# Enhancements

### Streamlining of Mail Merge Process.

When the Mail Merge process is followed the Letter Signatory and Selected and Marketing options now appear on the same window streamlining the process and enabling the user to reach the mail

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#### Anonymisation Improvements.

When carrying out anonymisation under the GDPR processes a new warning message appears advising that candidates should not be anonymised if they have worked for you recently and you should check documents and notes for personal details for enhanced visibility. The IQXNet user record is also cleared when record is anonymised.

IQX X
Do NOT anonymise if they have worked for you recently. You and your clients require to be able to identify them. Before Anonymising you must inspect Documents and Notes for personal details
ок

Extra text on the Apply button has been added with the aim of preventing anonymising records too soon 'Have you checked that placements are finished and there is no future work booked?Have you checked all Notes, and documents to ensure there are no personal details in them?'.

#### Nominal Code Segments - Defunct codes hidden by default.

Defunct nominal codes are hidden by default with a drop down menu to view defunct codes if required.

#### Shift Template settings enforced when adding shifts at timesheet stage.

When 'Template Required for Shifts Added on Timesheets' the shift template settings are now fully enforced.

#### Shift Description added to provisional timesheet.

When completing a provisional timesheet the Shift view shows the shift Description.



#### Release 2.18.11

Our Ref.									ncel Shift					
TYGET.	Date From	To Break (Mins)		Pay	Bill (	Grade AWR	? Ltd?	Their Note Ref.	Shift Type	Client Note	Consultant	Order Reason	Description	
10567 Tr 10568 F 10569 S	/ed 13/06/2018 06:00 Thu 14/06/2018 06:00 Fri 15/06/2018 06:00 Sat 16/06/2018 06:00 Sun 17/06/2018 06:00	14:00 60 14:00 60 14:00 60	7.00 7.00 7.00			AN AN AN AN	N N N N		E E E E		SHELLEY SHELLEY SHELLEY SHELLEY SHELLEY		Early Day Early Day Early Day Early Day Early Day	
		Total	35.00											

# When adding an extra Payband to a provisional timesheet you can now select a shift to link it to.

Allocates a date to a payband on a provisional timesheet **IF** Temp Desk set to show shift dates.

#### Loading shift viewer from ALT + F8.

The shift viewer now loads quicker using Alt+F8 or from the Select Menu. If a shift cannot be found a message now appears advising of this.

#### WhenCreated added to Staff table.

The WhenCreated date and time will show for NEW consultants in top left section of the User record.

#### Additions to Timesheets.

2024/04/16 04:34

The Our Ref has been added to the shifts section of a completed timesheet and Reference has been renamed to Their Ref.

#### **Database Function Names.**

Database Functions are now labelled with the underlying function name in addition to the visible name.

#### Warning message if timesheet image slow to load.

When adding a timesheet image to a timesheet in IQX if it is a large file and is slow to load you will now receive a message advising you of this.



Release 2.18.11

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