



# Release 2.20.11

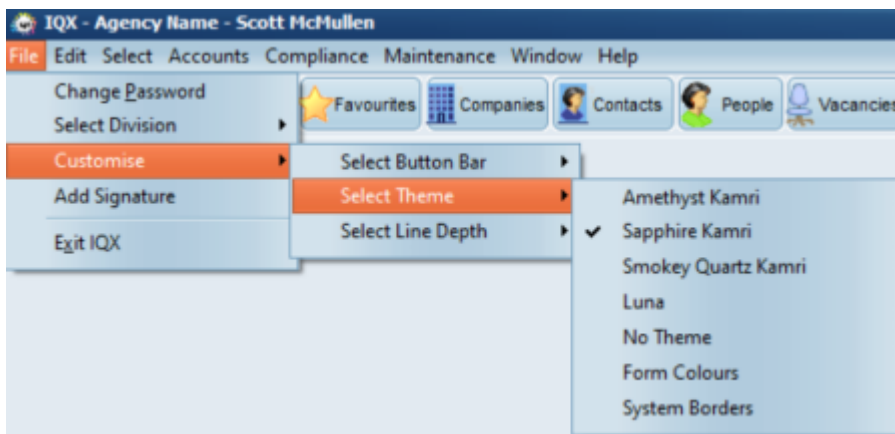
If you have custom forms defined in IQX, not all new features may be available to you. Your agency custom forms are shown on Help – About.

- [Features](#)
- [Enhancements](#)
- [System Administrator](#)
- [Fixes](#)

## FEATURES

### User Display Preferences Enabled

There is a new setting within each individual user's File menu that let's you select an alternative Theme to change the display colours and buttons.

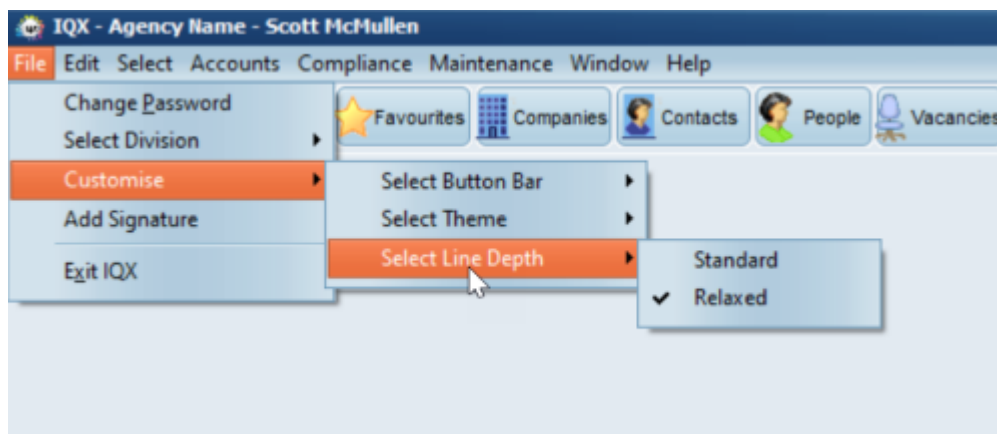


[https://iqxusers.co.uk/iqxhelp/doku.php?id=sa\\_maintenance\\_17](https://iqxusers.co.uk/iqxhelp/doku.php?id=sa_maintenance_17)

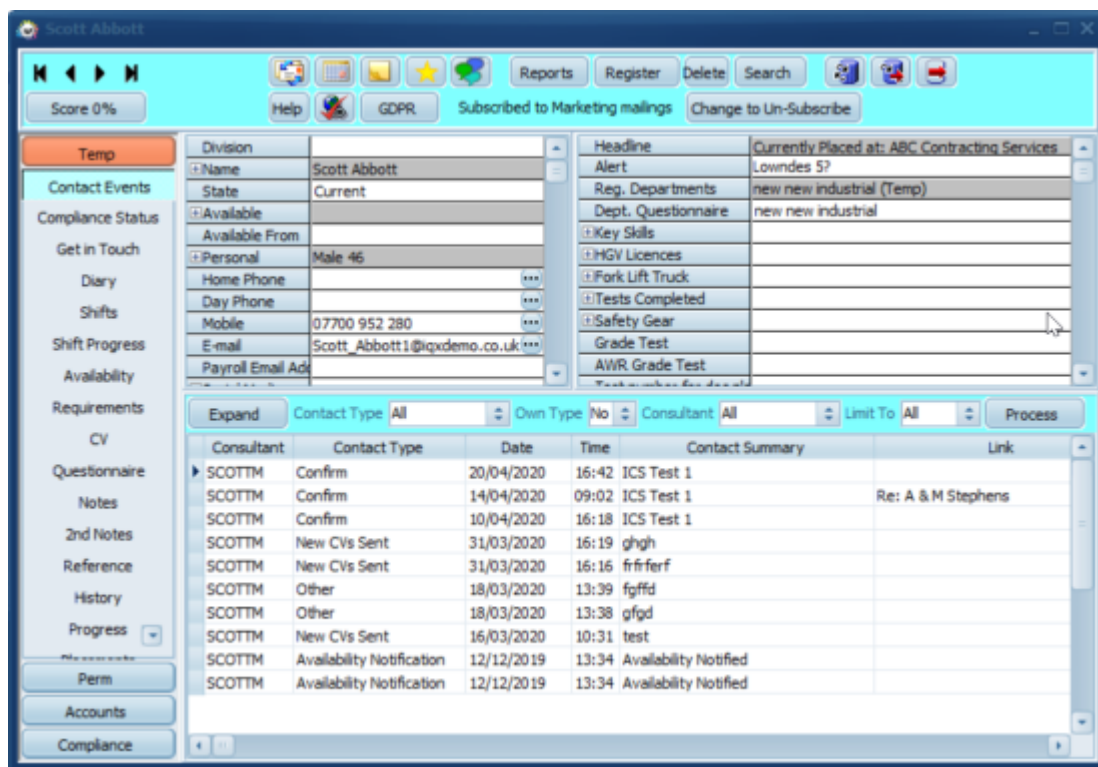
Note: Changes will take effect when the user next logs in.

### Relaxed Line Depth

There is a new setting within each individual user's File menu that let's you decide if you want standard or relaxed line depth.



Standard Depth



Relaxed Depth



Consultant	Contact Type	Date	Time	Contact Summary	Link
SCOTTM	Confirm	20/04/2020	16:42	ICS Test 1	
SCOTTM	Confirm	14/04/2020	09:02	ICS Test 1	Ref: A & M Stephens
SCOTTM	Confirm	10/04/2020	16:18	ICS Test 1	
SCOTTM	New CVs Sent	31/03/2020	16:19	ghgh	
SCOTTM	New CVs Sent	31/03/2020	16:16	frfrferf	
SCOTTM	Other	18/03/2020	13:39	fgfffd	
SCOTTM	Other	18/03/2020	13:38	gfgd	
SCOTTM	New CVs Sent	16/03/2020	10:31	test	
SCOTTM	Availability Notification	12/12/2019	13:34	Availability Notified	

If 'relaxed' line depth is chosen all grid lines and inspector cells will be increased in height by 25% (if not already increased elsewhere)

Note: Changes will take effect when the user next logs in.

## Global key word search for Candidates and Clients

Users will now be able to access candidates, companies and vacancies quicker with the ability to search not only for the keyname and registration number from the person selector but keywords, CV and Notes without having to go to the Search view first.

Name will search on keyname in the same way that it always has and putting an \* in the search box will still return all records.

Toggle to the Key Words button to search on surname, forename, registration number, address including town, county and postcode, payroll number and NI number. If set up by your agency you will also be able to search on some questions and items specified in a function.

Toggle to the CV or Notes button to search in either the CV or the notes views.

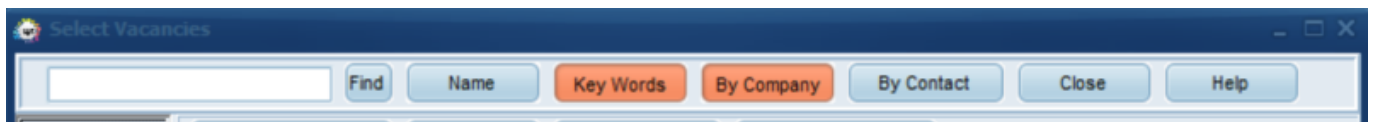
**Select Person**

Find Quick Lookup [ ] Close Help

Name Key Words CV Notes New Fast New

**Select Company**

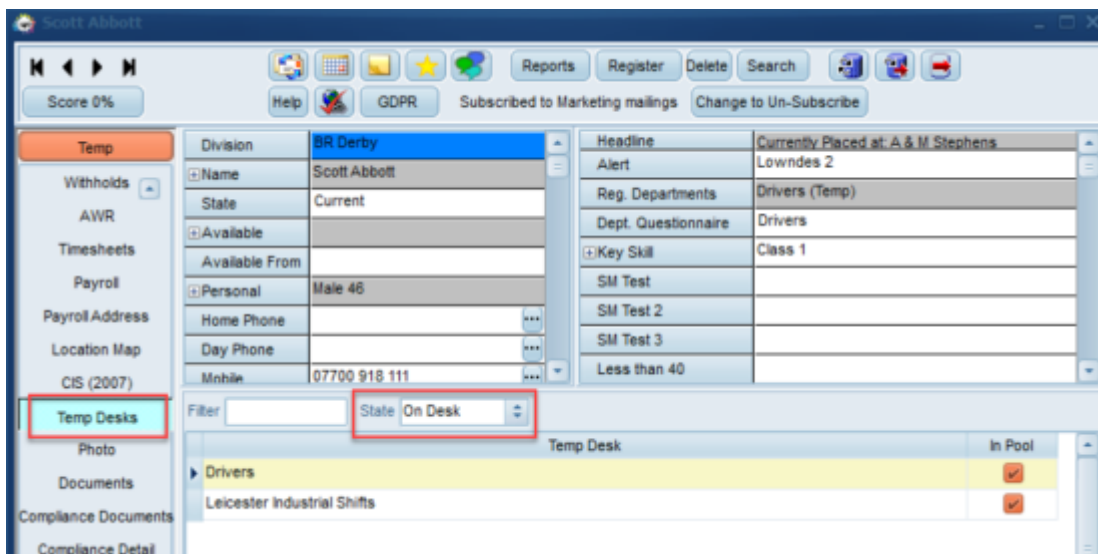
Find Keyname Key Word Companies Contacts New Close Help



This feature requires administrator set up.

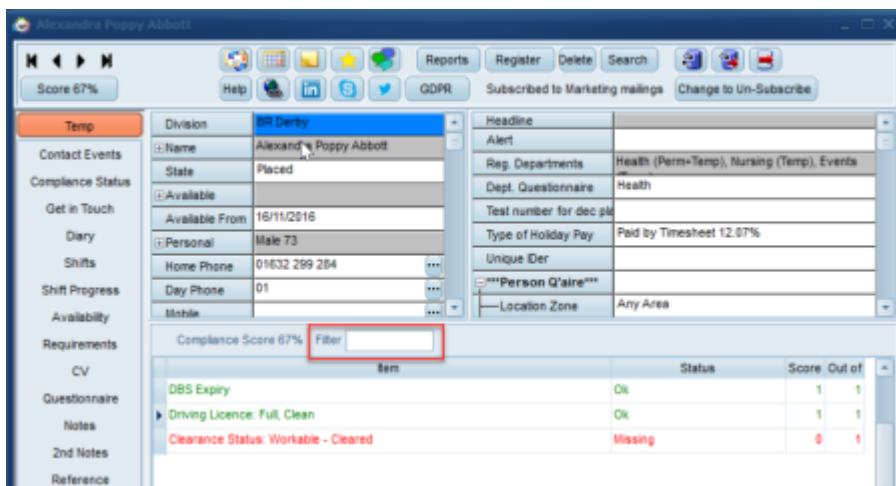
## New filter on Person Tempdesk view

When on a Candidate record and in the Temp Desks view a Filter and State have been added. When State is set to 'On Desk' it will only show Temp Desks that the Candidate is associated with.



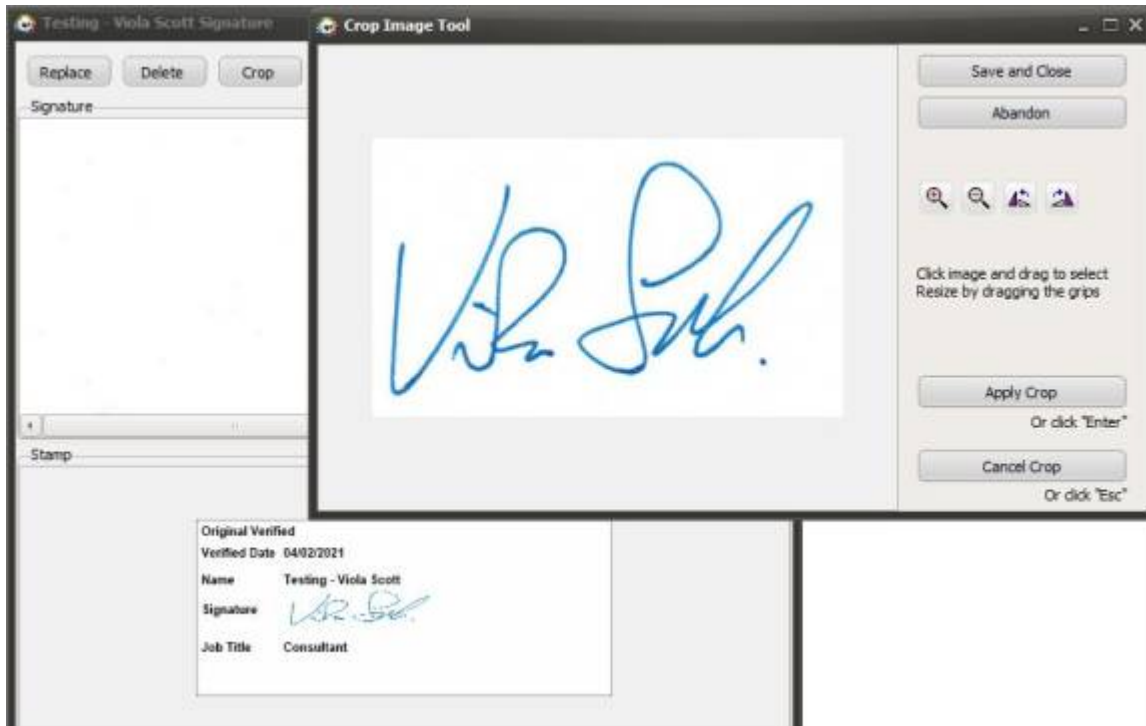
## Filter and Sort Order added to Compliance Score Details

You are able to sort the columns within the score details of a person record to help you understand what Compliance has been passed and what is missing. A Filter has also been added to quickly identify if certain items are missing or not. Useful if you have lots of criteria.



## Compliance Document Dynamic Stamping

Users with access to compliance documents can now have an image of their signature uploaded which can then be used, alongside the verification date of the documents, to stamp the documents.

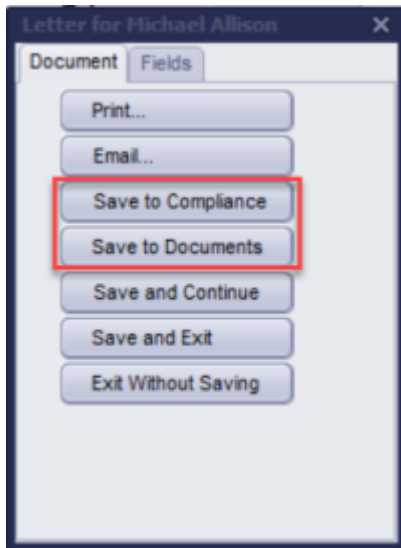


This feature requires administrator set up.

## Option on Word Document to save to Compliance Documents

Users can save documents e.g. training certificates or checklists created when making a contact event direct to the candidate record.

When creating the document users will (depending on user settings) see two new options for Save to Compliance and Save to Documents.

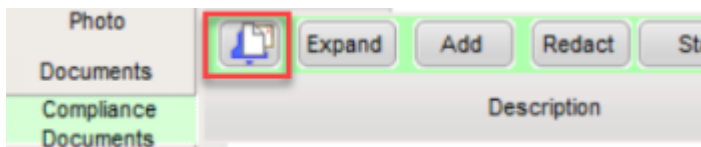
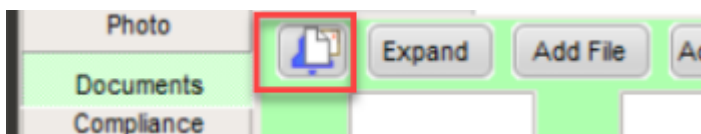


Save to Compliance will open the Compliance Documents view allowing users to answer any questions connected to the document type they select.


Save to Documents will allow the user to give the document a title and select a type then a copy will be saved to the candidate documents view.

## Document picking up and sending - Packs or Individual

When a client requires you to send a document pack or a selection of documents to them for approval before making a placement this can now be done from the document send button on the documents or compliance documents section of candidate record.



This will open a floating window where you can select which document pack or individual documents you want to send, whether you want to send additional reports or archived documents allowing users to customise what they want to send. Users will also be able to preview all documents and reports before they are sent.



Send Documents - Michael Allison

Doc Pack: Pack 1

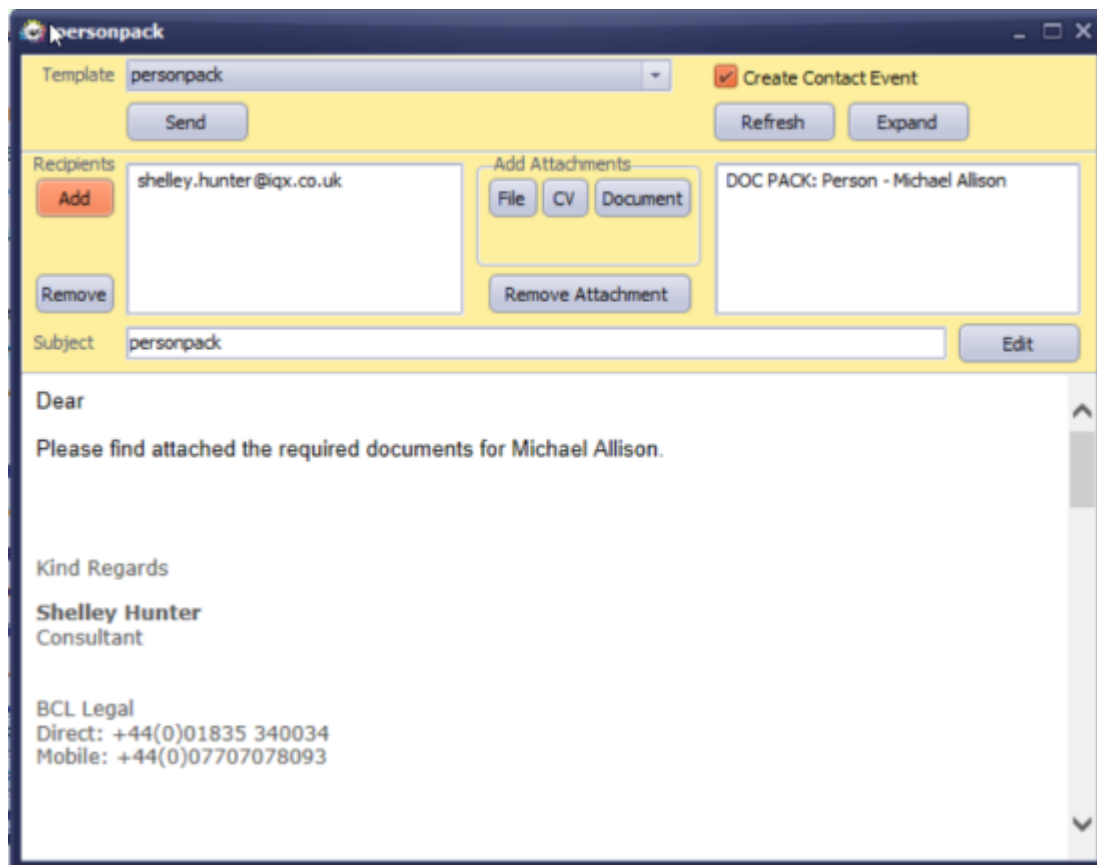
Wrap: Wrap PDFs in Single PDF

Only PDFs and Reports can be wrapped into Single PDF

Buttons: Add Extra Reports Report, Notify, Save, Abandon, Help

Buttons: Tick All, Invert Ticks, Expand, Filter, Show Archived

Include In Pack	Sort Order	Is Compliance	File Extension	Document Description	Type Description	Created
<input checked="" type="checkbox"/>	1	<input type="checkbox"/>	RTM	barts checklist	Extra Reports Report	
<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>	PDF	Michael Allison Contract	Contract	02/10/20 09:36
<input checked="" type="checkbox"/>	20	<input checked="" type="checkbox"/>	PDF	Michael Allison Security	Security	29/10/20 20:35
<input checked="" type="checkbox"/>	30	<input checked="" type="checkbox"/>	PDF	Michael Allison Compliance App	Compliance Applicant	29/10/20 09:42
<input checked="" type="checkbox"/>	40	<input checked="" type="checkbox"/>	PDF	Michael Allison Test read only	Test read only doc	04/11/19 12:45
<input type="checkbox"/>	140	<input type="checkbox"/>	DOCX	eve test 2	Visa	29/10/20 20:07
<input type="checkbox"/>	150	<input type="checkbox"/>	DOCX	eve test	Passport	29/10/20 20:07
<input type="checkbox"/>	160	<input type="checkbox"/>	DOCX	test 4	Passport	29/10/20 10:21
<input type="checkbox"/>	170	<input type="checkbox"/>	DOCX	test 2	Security - All	29/10/20 09:00
<input type="checkbox"/>	180	<input type="checkbox"/>	DOCX	test 1	Passport	29/10/20 09:00
<input type="checkbox"/>	190	<input type="checkbox"/>	PDF	Mergepage3	Awaits Checking	02/10/20 11:41
<input type="checkbox"/>	200	<input type="checkbox"/>	PDF	General - All Merge page1	General - All	02/10/20 09:32
<input type="checkbox"/>	210	<input type="checkbox"/>	PDF	General - All Cv12	General - All	17/09/20 15:19
<input type="checkbox"/>	220	<input type="checkbox"/>	PDF	Passport	Passport	15/01/20 19:25



personpack

Template: personpack

Buttons: Send, Refresh, Expand

Recipients: shelly.hunter@iqx.co.uk

Buttons: Add, Remove

Add Attachments: File, CV, Document

Remove Attachment

DOC PACK: Person - Michael Allison

Subject: personpack

Edit

Dear

Please find attached the required documents for Michael Allison.

Kind Regards

**Shelley Hunter**  
Consultant

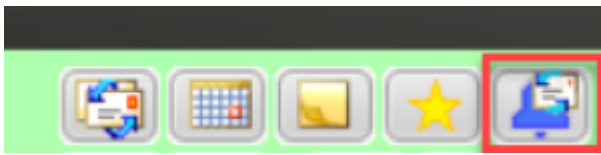
BCL Legal  
Direct: +44(0)01835 340034  
Mobile: +44(0)07707078093

Please note this feature requires system administrator set up.

## Notifications - Ability to send directly from Candidate record

The notifications system has been extended to include the ability to send template emails and text messages direct from a candidate record using the new icon on the top of the record.



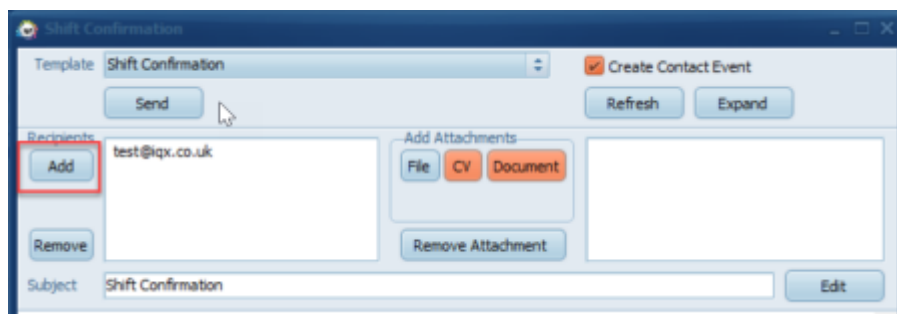
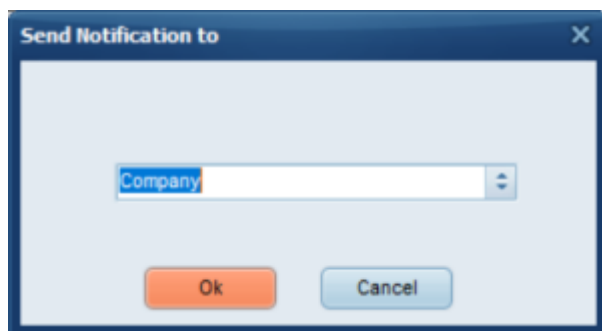


This can be used to send registration packs or to advise of outstanding or outdated documentation. This will launch the notification window where users can preview the message, add any attachments and make adjustments as necessary.

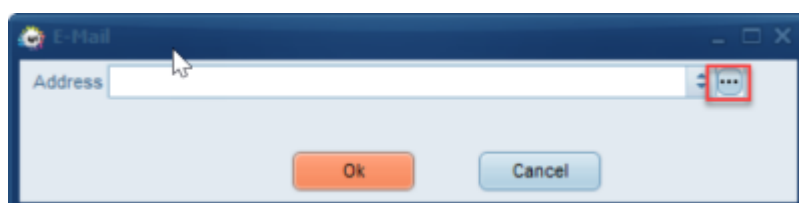
This feature requires System Administrator set up.

## Notifications - Ability to select from other 'recipient' email addresses

When sending a Notification to the client users are now able to select multiple recipients from a drop down.

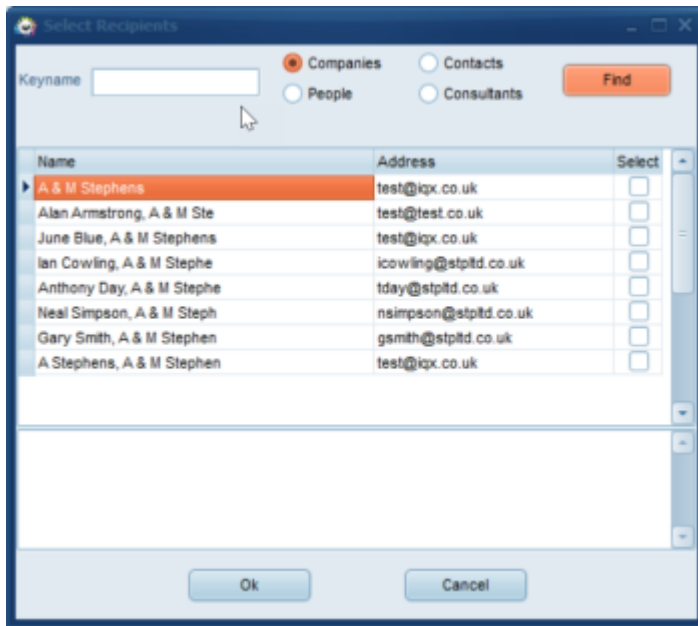


There is an edit box at the top so users can still add manually, however on pressing on the 3 dots this will list all the client email addresses (including the vacancy site email address, if it is applicable).



Checkbox 'select' at the end of each record. The OK box would add anything from the edit box, and all those that were ticked in one go.





Keyname

☒ Companies
 ☐ Contacts
 ☐ People
 ☐ Consultants

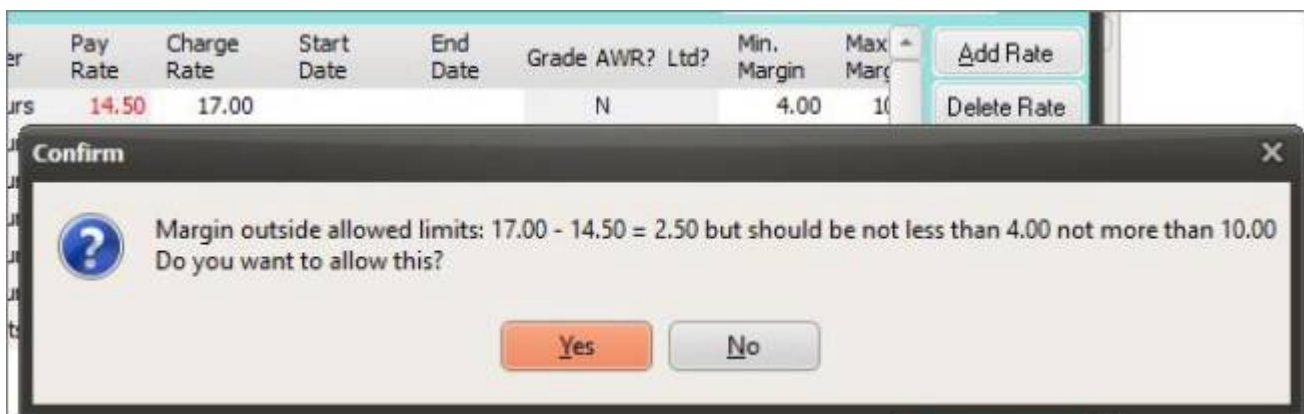
Name	Address	Select
A & M Stephens	test@iqx.co.uk	<input type="checkbox"/>
Alan Armstrong, A & M Ste	test@test.co.uk	<input type="checkbox"/>
June Blue, A & M Stephens	test@iqx.co.uk	<input type="checkbox"/>
Ian Cowling, A & M Stephe	icowling@stpild.co.uk	<input type="checkbox"/>
Anthony Day, A & M Stephe	tday@stpild.co.uk	<input type="checkbox"/>
Neal Simpson, A & M Steph	nsimpson@stpild.co.uk	<input type="checkbox"/>
Gary Smith, A & M Stephen	gsmith@stpild.co.uk	<input type="checkbox"/>
A Stephens, A & M Stephen	test@iqx.co.uk	<input type="checkbox"/>

## Placements Rates Enhancements

Ability to police margins and enforce both a minimum and a maximum margin. Set per Temp Desk and enabled in a Rates Scheme.

Rate Scheme		General Skilled Rates											
Employer NI %	13.8	Holiday Pay %	12.07	Discount %		<input type="button" value="Recalculate"/>		<input type="button" value="Add Rate"/>		<input type="button" value="Delete Rate"/>			
Description	Per	Pay Rate	Total Cost	Charge Rate	Discounted Charge	Margin	Week Start Date	Week End Date	Grade	AWR?	Ltd?	Min. Margin	Max. Margin
Standard	Hours	12.00	15.10	17.00	17.00	1.90				N		4.00	10.00
Time x 1.5	Hours	18.00	22.66	25.50	25.50	2.84				N			
Night	Hours	15.00	18.88	21.25	21.25	2.37				N			

Users with override rights will be able to approve a margin outside the limits and the occurrences will be audited for reporting purposes.



Pay Rate: 14.50  
 Charge Rate: 17.00  
 Grade: N  
 AWR?: N  
 Ltd?:  
 Min. Margin: 4.00  
 Max. Margin: 10.00

**Confirm**

? Margin outside allowed limits:  $17.00 - 14.50 = 2.50$  but should be not less than 4.00 not more than 10.00  
 Do you want to allow this?

## ReferenceRequest Table Changes

As candidates can now add Web Reference requests from the Registration Wizard measures have



been put in place that can enable the candidate to state whether they are happy for a ReferenceRequest to be sent immediately or not.

Reference Request for Alexandra Poppy Abbott from James Joyce at Wicklow Marketing			
Report	Save and Close	Abandon	Update
Department	Events		
Reference			
Referee Name	James Joyce (James)		
Organisation	Wicklow Marketing		
Referee Job Title	HR		
Address	1 The Town Square, Melrose, TD6 9JJ		
Contact Details	Email: j@wicklow.com		
Job Title	Marketing Assistant		
Job Title Notes	Assisting on major clients		
Consultant			
Created	06/12/13 15:51		
Approved to Send	<input type="checkbox"/>		
Ask Candidate Before Send	<input type="checkbox"/>		
Sent to Referee	20/01/20 13:14		
Reminder Blocked	<input type="checkbox"/>		
Last Reminder			
Completed by Referee			

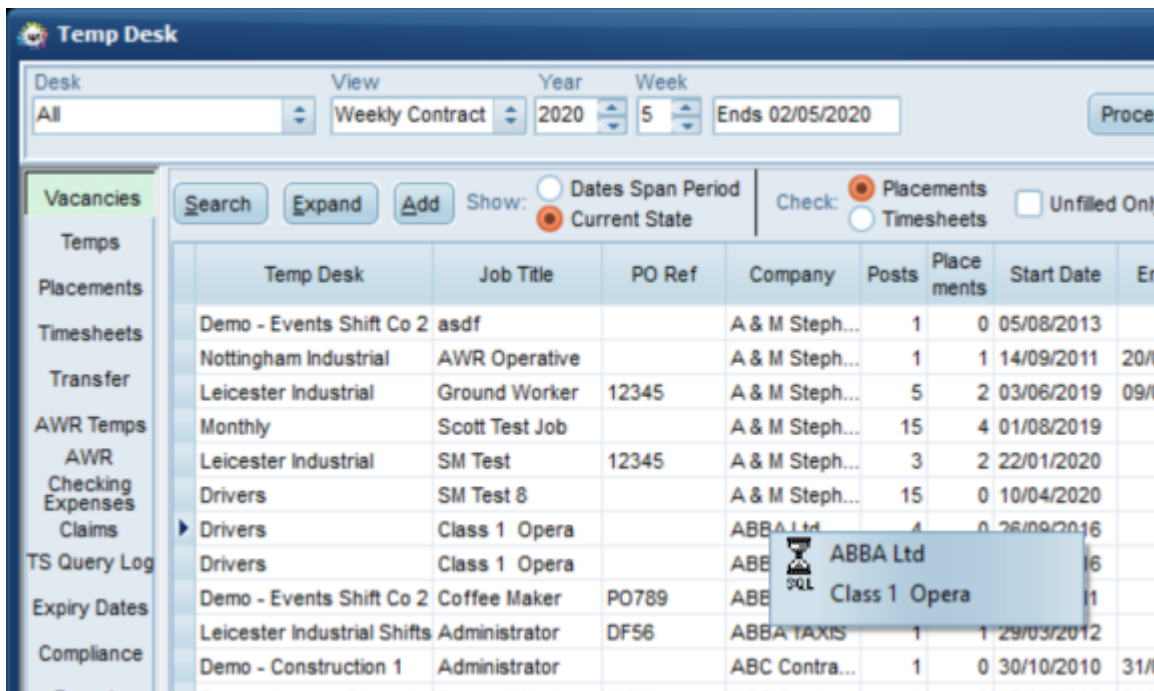
## ENHANCEMENTS

### TempDesk - Vacancy Shifts - Search Filter Added

To allow users to quickly identify records a search filter has been added to the Vacancy Shifts view on the TempDesk in addition to the Company and Position filters.

### TempDesk - Contract Desk quick link to company by right clicking

When on a Contact Desk on the Temp Desk you can now right click on a line to then open either the Company or the Vacancy.



The screenshot shows the 'Temp Desk' interface. At the top, there are filters for 'Desk' (All), 'View' (Weekly Contract), 'Year' (2020), 'Week' (5), and 'Ends 02/05/2020'. Below these are buttons for 'Search', 'Expand', and 'Add'. There are also radio buttons for 'Show: Dates Span Period' and 'Current State', and a 'Check:' section with 'Placements' (selected) and 'Timesheets'. A sidebar on the left lists various categories like 'Vacancies', 'Temps', 'Placements', 'Timesheets', 'Transfer', 'AWR Temps', 'AWR', 'Checking Expenses', 'Claims', 'TS Query Log', 'Expiry Dates', and 'Compliance'. The main table displays a list of temporary placements with columns: Temp Desk, Job Title, PO Ref, Company, Posts, Place ments, Start Date, and End Date. A tooltip is visible over the 'ABBA Ltd' company name, showing 'Class 1 Opera'.

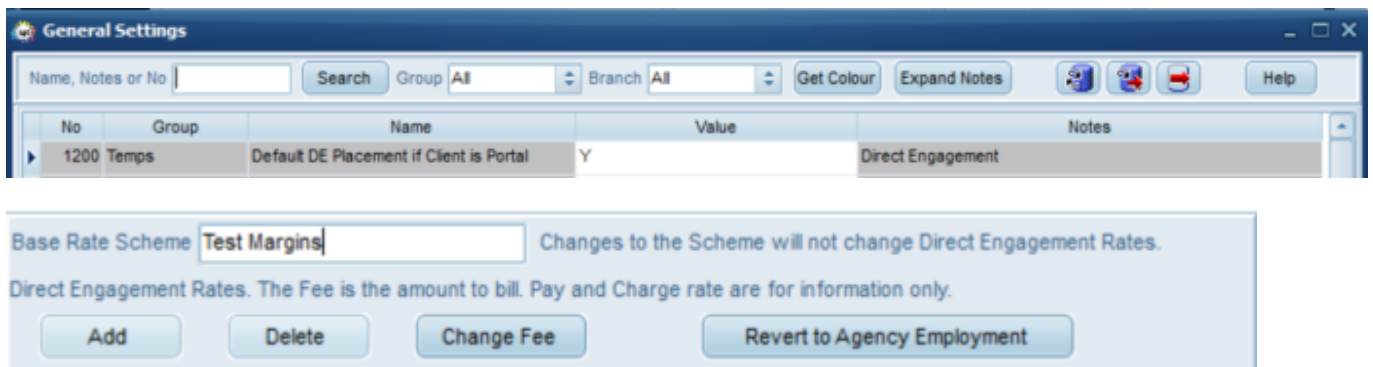
Temp Desk	Job Title	PO Ref	Company	Posts	Place ments	Start Date	End Date
Demo - Events Shift Co 2	asdf		A & M Steph...	1	0	05/08/2013	
Nottingham Industrial	AWR Operative		A & M Steph...	1	1	14/09/2011	20/09/2011
Leicester Industrial	Ground Worker	12345	A & M Steph...	5	2	03/06/2019	09/06/2019
Monthly	Scott Test Job		A & M Steph...	15	4	01/08/2019	
Leicester Industrial	SM Test	12345	A & M Steph...	3	2	22/01/2020	
Drivers	SM Test 8		A & M Steph...	15	0	10/04/2020	
Drivers	Class 1 Opera		ABBA Ltd	4	0	26/09/2016	
Drivers	Class 1 Opera		ABE	1	0	16/09/2016	
Demo - Events Shift Co 2	Coffee Maker	PO789	ABE	1	0	11/09/2016	
Leicester Industrial Shifts	Administrator	DF56	ABBA TAXIS	1	1	29/03/2012	
Demo - Construction 1	Administrator		ABC Contra...	1	0	30/10/2010	31/10/2010

## More User layout settings to hide some TempDesk Views

New User Layout Settings have been added that allows limiting of what can be seen on a user by user basis on the Tempdesk. They are 'Hide TempDesk AWR checking view', 'Hide TempDesk AWR Temps view' and 'Hide Tempdesk Compliance View'. Once activated these views are no longer visible on the TempDesk.

## Changes to Placement - Rates - Direct Engagement view and behaviour

Ability to specify that Direct Engagement is the default for new placements for portal clients. Use the Rates Scheme to prefill Direct Engagement pay and charge rates. Original Calculate button renamed to Change Fee, this is where to change the background rates that create the fee.



The screenshot shows the 'General Settings' window. At the top, there are search and filter options: 'Name, Notes or No', 'Search', 'Group' (All), 'Branch' (All), 'Get Colour', 'Expand Notes', and 'Help'. Below this is a table with columns: No, Group, Name, Value, and Notes. The table contains one row: '1200 Temps', 'Default DE Placement if Client is Portal', 'Y', and 'Direct Engagement'. Below the table, there is a section for 'Base Rate Scheme' with a dropdown menu set to 'Test Margins'. A note states: 'Changes to the Scheme will not change Direct Engagement Rates. Direct Engagement Rates. The Fee is the amount to bill. Pay and Charge rate are for information only.' At the bottom, there are four buttons: 'Add', 'Delete', 'Change Fee', and 'Revert to Agency Employment'.

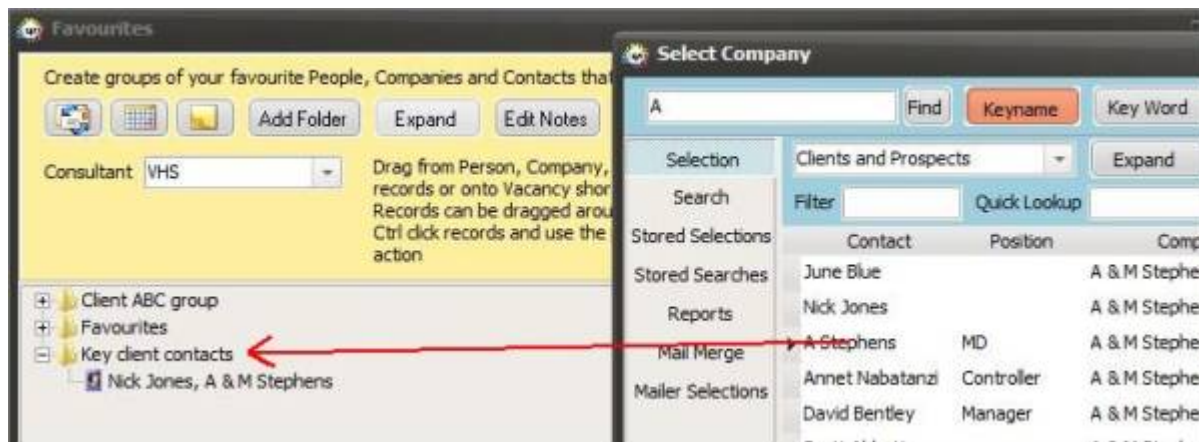
No	Group	Name	Value	Notes
1200	Temps	Default DE Placement if Client is Portal	Y	Direct Engagement

## Ability to Drag a Contact from the Contact Selector onto Favourites

Contacts can now be dragged directly into Favourites from the Contact Selector screen whereas



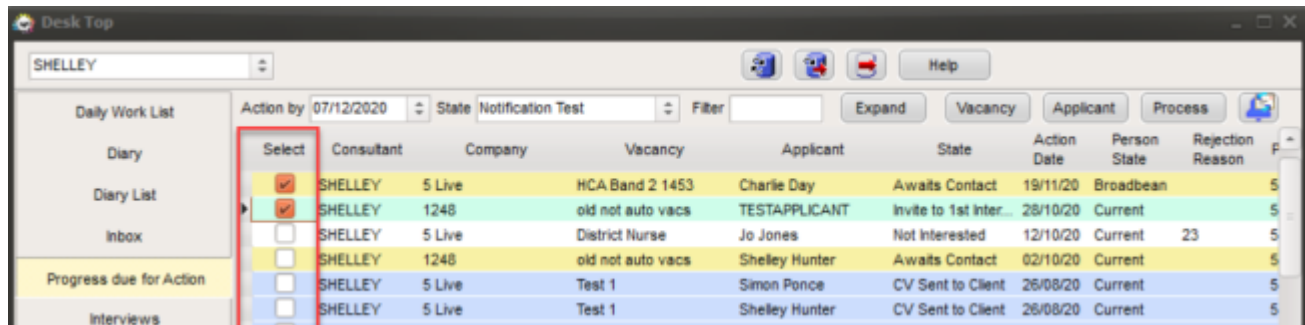
previously limitations meant they could only be dragged from a company record.



## On Desktop Select tick box moved to left of view

### Desktop Select Boxes

To help users be more efficient in their use of the IQX Desktop the select boxes have been moved on the following screens to the far left hand side; Daily Work List, Progress due for Action, Interviews, Contact Events due for callback, Current Vacancies, Tracked Vacancies.



Users will no longer need to stretch the size of the form in order to access the select boxes.

## Notifications - Ability to modify the message for ALL recipients rather than edit all individually

When sending notifications you can enter a 'Comment' line which will appear in every message in the batch, reducing the need for individual edits. You can control where it appears by putting `\{MSC_COMMENT}` in the Notification Template, otherwise it is put at the bottom, above the signature.



ID	CONFIRM8
Description	confirmation
Transmission Type	SMS
Notification Type	QueryConfirm
Recipient Type	Candidate
Sort Order	0
Group Code	
Division	

Are you available for the following shifts?

{MSC\_COMMENT}

{SHN\_DATEdd/mm/yyyy} {SHN\_FROM} - {SHN\_TO}

and {SHF\_COUNTMINUS1} others.

Template: confirmation

☒ Create Contact Event

Send Send All 2 < Previous Next > Refresh Expand

Recipients: Add 07700 947 823 Remove

Subject: confirmation

Comment (for all): This is a test comment

Add Attachments: File CV Document Remove Attachment

Are you available for the following shifts?

This is a test comment

1/05/2020 08:00 - 17:30

and 0 others.

## Notifications - Preview Template

When making changes to a notification template when you click on Preview Template this saves and shows the changes you have made. Previously you would need to click on Update and then Preview Template for the changes to show.



## Improved Notification Substitutions for SMS

Improvement made to notifications so that when sending shift notifications/confirmations the SMS can be shortened. Example - Instead of having an SMS stating all shifts you can now give date and time for the first shift and show 'X' others.

## Reduced lines between bottom of message and start of signature

The spacing between the bottom of the email body and the start of the signature has been reduced to make it more visually appealing.

## New SMS Chat button

The image for SMS chat via the provider SMSWorks has been updated.

## Fixes

- Database Diagnostics, Server Details now compatible with Linux.
- Restored wiki link to Help, Contents.
- Shift Cancel function now able to deal with book, cancel with refill, refill, cancel again.
- Fixed error if new candidate has same email address as an existing record.
- Fixed PDF error when using Save As from Invoice PDF screen.
- Fixed error where timesheet image has been moved before invoice PDF created.
- Variations in Timesheet Complete, Auto Complete and WebComplete fixed.
- Fixed Self Bill Timesheet Create (button) giving SQL error on ASA17 DBs.
- Fixed Vacancy Headline number formatting.
- Fixed the block on setting Archived docs back to Un-Archived if no replacement to correctly block.
- Fixed error using Process from Daily Work sheet.



- Fixed where duplicate contact event created when Reply to used on Desktop.
- Fixed Custom Column Departmental not having DivisionID generated.
- Fixed List out of bounds error when removing defunct from a division.
- Staff picklists now obey divisions allowed.

From:

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

Permanent link:

[https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release\\_2.20.11&rev=1614591112](https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release_2.20.11&rev=1614591112)

Last update: **2021/03/01 09:31**

