



# Release 2.21.08

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.

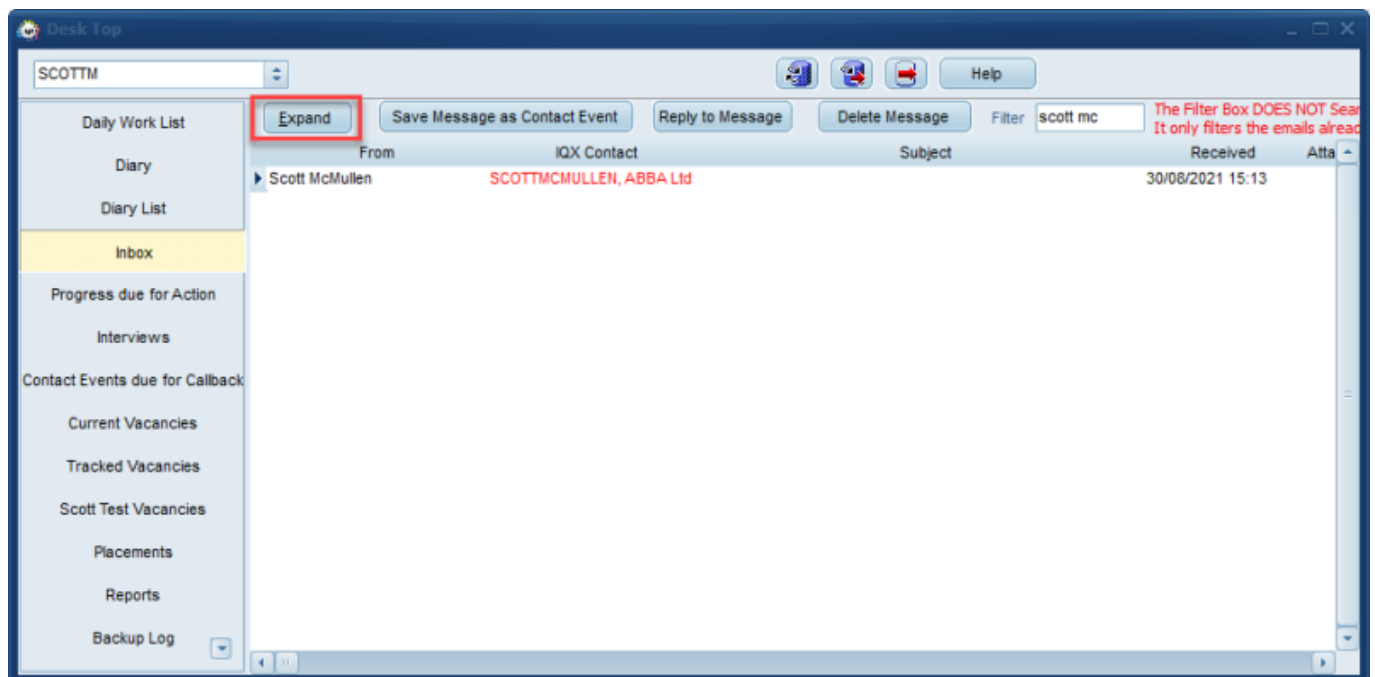
- [Features](#)
- [Enhancements](#)
- [System Administrator](#)
- [Fixes](#)

## FEATURES

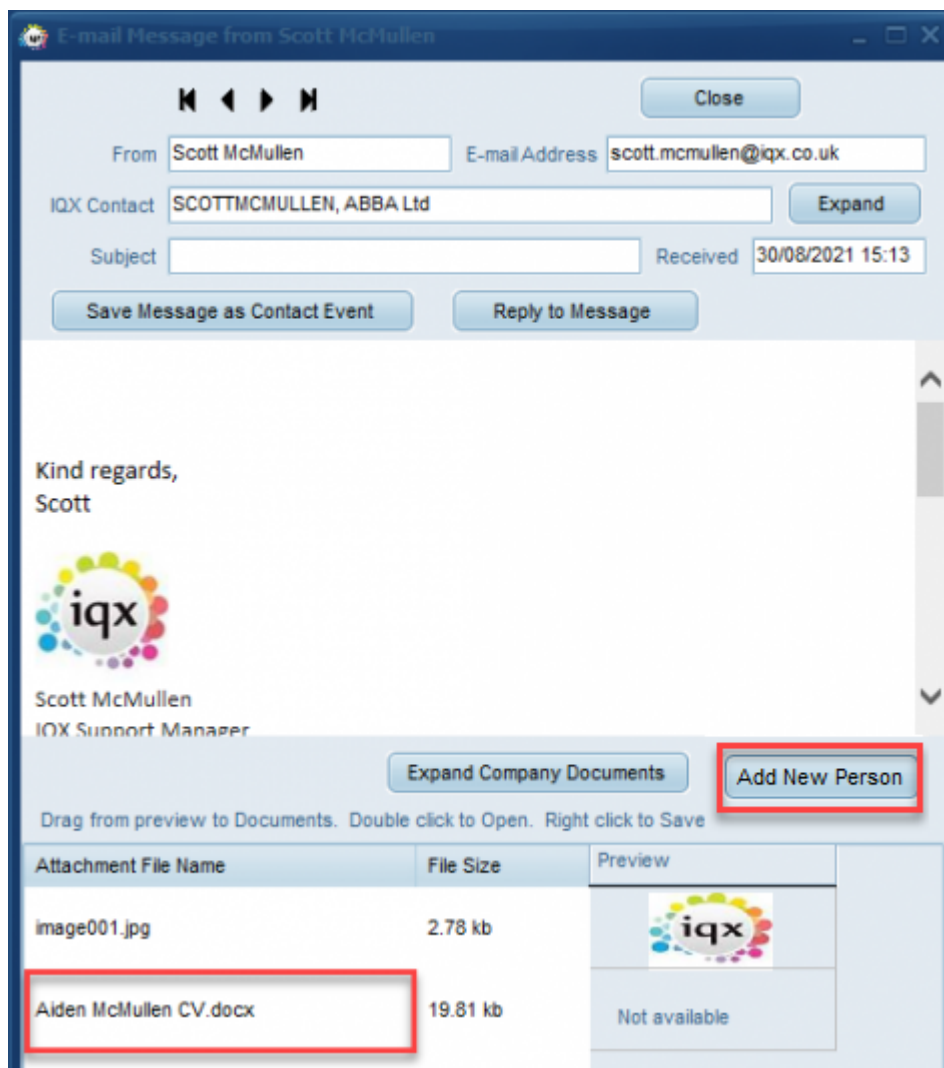
### Start the New Person Wizard directly from IQX Inbox

You can now load a CV into the New Person wizard directly from your inbox in IQX. From here you can parse the CV and create the new person as you normally would from a Word CV or New button. The email has to be visible in your inbox in IQX (in the inbox limit set in IQX). The CV has to be in either TXT, PDF or Docx format. To do this follow these steps.

Find the email that has the CV you want in your IQX inbox and click on Expand.



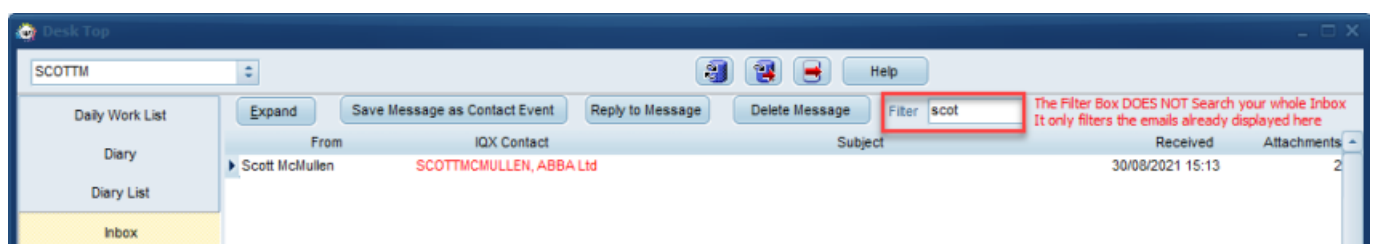
Click on the required CV / Document to select it. Once you have clicked on the CV to select it click on the 'Add New Person' button.



This will load the CV text into the New Person Wizard and allow you to Parse the CV and create the new person.

## Filter added to Inbox and sortable columns

A filter has been added to the Inbox view within the Desktop to aid finding the email wanted quickly. Please note the filter will only find emails that are already visible on the list, it will not search your whole inbox. An example of the filter is shown below.



In addition to this all columns within the Inbox are now sortable.



## Save Emails in Documents and Compliance Documents

Incoming emails have always been able to be saved as Contact Events from Desk Top Inbox. Now, if you save an email from outlook to a folder you are now able to drag it onto the Documents and Compliance Documents views in IQX as a MSG file. You are also able to find and save using the Add buttons. An example of where this is useful where an email is proof of compliance or acceptance.

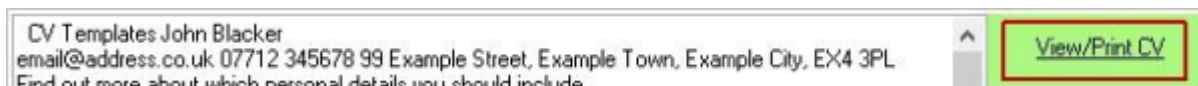
<a href="#">Expand</a>	<a href="#">Add File</a>	<a href="#">Add MS-Office Document</a>	<a href="#">Delete</a>	<a href="#">Archive</a>	<a href="#">Make Current CV</a>	<a href="#">Co</a>
<a href="#">Send Docs</a>	State <input type="text" value="All"/>	Type <input type="text" value="All"/>	Filter <input type="text"/>			
Description	Type	File Type	Created	P	T	
Contract 2.21.08 Release Notes	Contract	MSG	23/09/2021 15:12			

## CV improvements - Now CV can be either Docx or PDF Format

Ability added to have the main CV attached in a PDF format (previously only .doc, .docx formats allowed)

If the text from the PDF is accessible it will be copied into the CV Text box for search facilities and quick reading, in the same way as happens for .docx files.

Instead of Edit/Print the right hand button will be View/Print



In the Documents view file types of pdf and .docx can both now be made into the Current CV using the Make Current CV button.

If you would like to be able to use this feature please contact IQX Support.

## Client Notifications from Shortlist to include multiple candidates

If there are multiple candidates in a short list - e.g. that have been invited to interview and their progress status reflects this and they have an interview date and time specified, it is now possible to send all interview information to the client under one notification (using the progress merge fields) rather than having multiple emails per candidate going to the client.

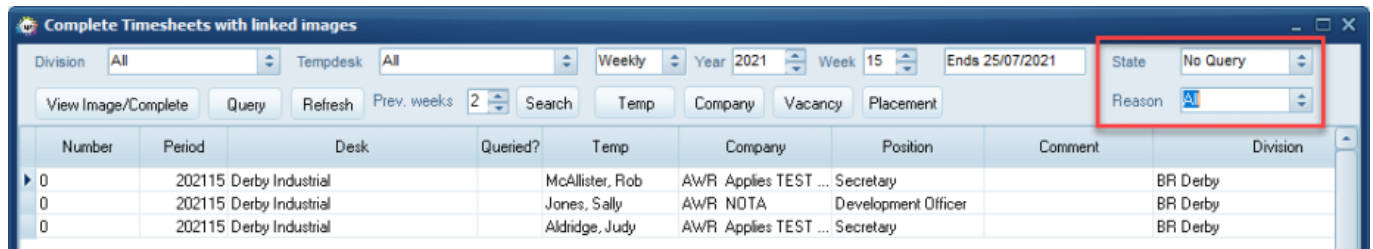
This Feature requires system administrator setup.

## Filters added to Complete Linked Timesheets view

In the 'Complete Linked Timesheets' section of the main 'Accounts' tab filters have been added to make sorting through a very long list easier to manage. Filters have been added for 'State' (front office/back office etc) and also 'Reason'. Reason's can be managed and added in the TS Query



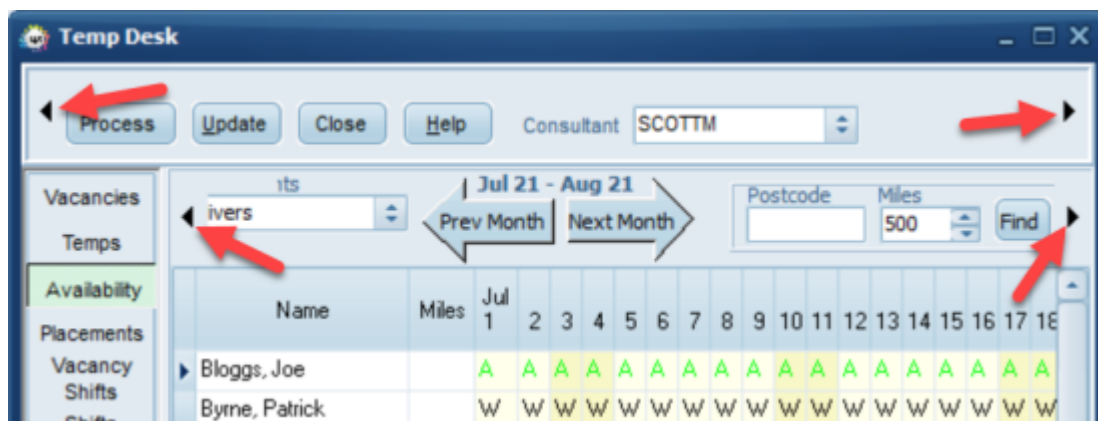
Reasons section.



## Scroll arrows added to Temp Desk headers

It was noted that when viewing the Temp Desk on a small screen there was no easy way to see all fields and options in the headers.

To combat this we have added scroll arrows on the top panel header and also for some of the views headers. At present we have only been able to add this for the following:  
Vacancies, Temps, Availability, Placements, Vacancy Shifts, Timesheets, Expiry Dates and Compliance.



## Temp Desk Availability - Ability to see all in week on Contract Desks

On the Availability view for a Contract desk on the Temp Desk only the first day of each week is shown.

Now if you right click on the first day this will show you all the availability entries they have in that week, rather than just the day shown. Similarly if the Temp is working it will show you where they are working each day.



The screenshot shows the Temp Desk application interface. At the top, there's a header bar with 'Temp Desk' and navigation buttons like 'Process', 'Update', 'Close', and 'Help'. Below this, there's a section for 'Desk' (Derby Industrial), 'View' (Weekly Contract), 'Year' (2021), and 'Week' (15). A date range 'Ends 25/07/2021' is shown. A sidebar on the left contains various navigation options. The main area displays a calendar grid for July 2021. A dropdown menu is open for the date 02/08/21, showing availability for the day and options to add day availability, holiday, or unavailability. The calendar grid shows names of staff members and their availability status.

## New Temp Desk setting to pre-tick Match exact grade only

A new field has been added in Temp Desk settings that allows you to pre-tick to match exact grade only so this becomes the default when filling shifts. Go to Maintenance>Temps Setup>Temp Desks. Expand the Desk you want to apply this for and then at the bottom tick the box for 'Shift Match Exact Grade Only'.

The screenshot shows the Temp Desk settings page. It has three main sections: 'Match from', 'Match', and 'Previously worked only'. In the 'Match from' section, 'Current in Temp Desk Pool' is selected. In the 'Match' section, '1' week(s) is selected, and the starting date is '30/08/2021'. In the 'Previously worked only' section, 'No' is selected. The 'Match Exact Grade Only' checkbox is checked and highlighted with a red box.

## User Role that allows provisional timesheet creation without Accounts role

A new user role has been added that will allow users that have it enabled to create timesheets even if they do not have the Accounts role.



This Feature requires system administrator setup.

## Optional Document Expiry date field

A column for Expiry Date has been added to the Documents view of Person records. This is NOT linked to a question and can be amended on the view.

This is particularly useful if your agency does NOT use IQX Compliance Documents and therefore does not capture linked expiry information.

The screenshot displays the IQX system interface for Alexandra Poppy Abbott. The 'Documents' tab is selected in the left sidebar. The main area shows a list of documents with columns: Description, Type, File Type, Created, Expiry Date, Publish to Web, and In CV. The 'Expiry Date' column is highlighted with a red box, showing dates like 31/07/2021. The 'Documents' tab is also highlighted with a red box in the sidebar.

Description	Type	File Type	Created	Expiry Date	Publish to Web	In CV
Archived CV 08/03/2016		MS Offl...	08/03/2016 12:18	31/07/2021	<input type="checkbox"/>	<input type="checkbox"/>
Archived CV 30/03/2021		DOC	08/03/2016 12:18		<input type="checkbox"/>	<input type="checkbox"/>
Archived CV 01/07/2015		MS Offl...	13/02/2015 09:41		<input type="checkbox"/>	<input type="checkbox"/>
Archived CV 20/03/2015		MS Offl...	13/02/2015 09:41		<input type="checkbox"/>	<input type="checkbox"/>
Archived CV 20/03/2015		MS Offl...	13/02/2015 09:41		<input type="checkbox"/>	<input type="checkbox"/>

Because this would not be useful for all agencies this is switchable and would need to be activated by a System Administrator.

## AWR Linked Placements - Identifying the primary placement

Where placements already exist and have been linked through an LE Code, the Primary record will be displayed with the Y, those that are linked will be N, making it easier to identify the one they are linked to.

Previously it was difficult to identify the placement that is the master, that links them all together.

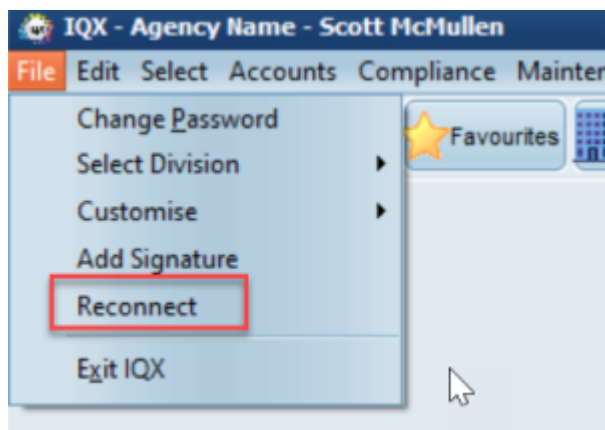




Linked	Primary	Company	Job Title	Start	End
<input checked="" type="checkbox"/>	Y	Hale & Dorr	Silver Service 2	23/07/2012	04/08/2013
<input checked="" type="checkbox"/>	N	Hale & Dorr	Silver Service 3	25/07/2012	04/02/2015
<input checked="" type="checkbox"/>	N	Hale & Dorr	Silver Service 4	26/07/2012	26/07/2012
<input checked="" type="checkbox"/>	N	Hale & Dorr	Silver Service 5	27/07/2012	20/02/2015

## Reconnect button added to the File Menu

From time to time a user may lose connection to the Database, when working remotely or on a slow connection. As a result of this we have added a 'Reconnect' button in the file menu that enables users to force a reconnect.



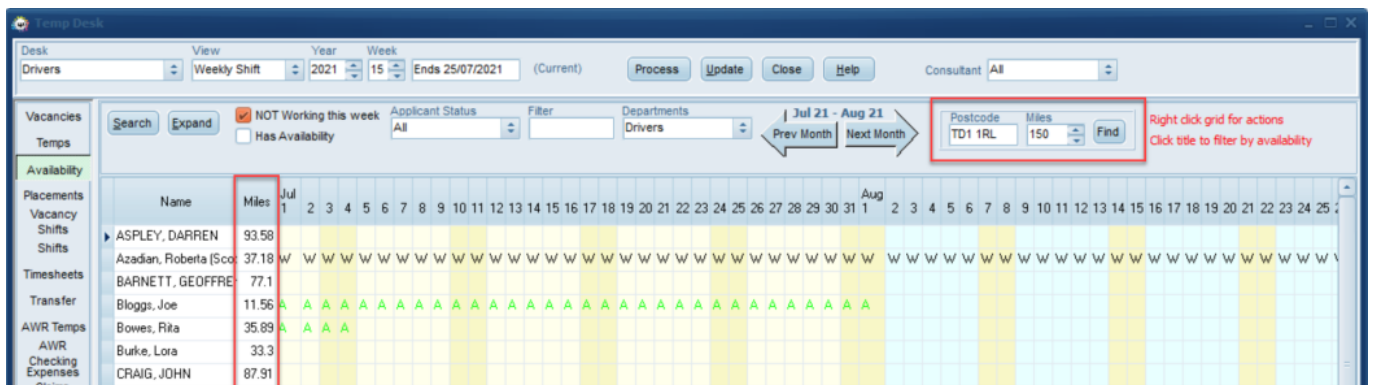
## ENHANCEMENTS



## Postcode Radius Searching added to Temp Desk Availability and Vacancies Views

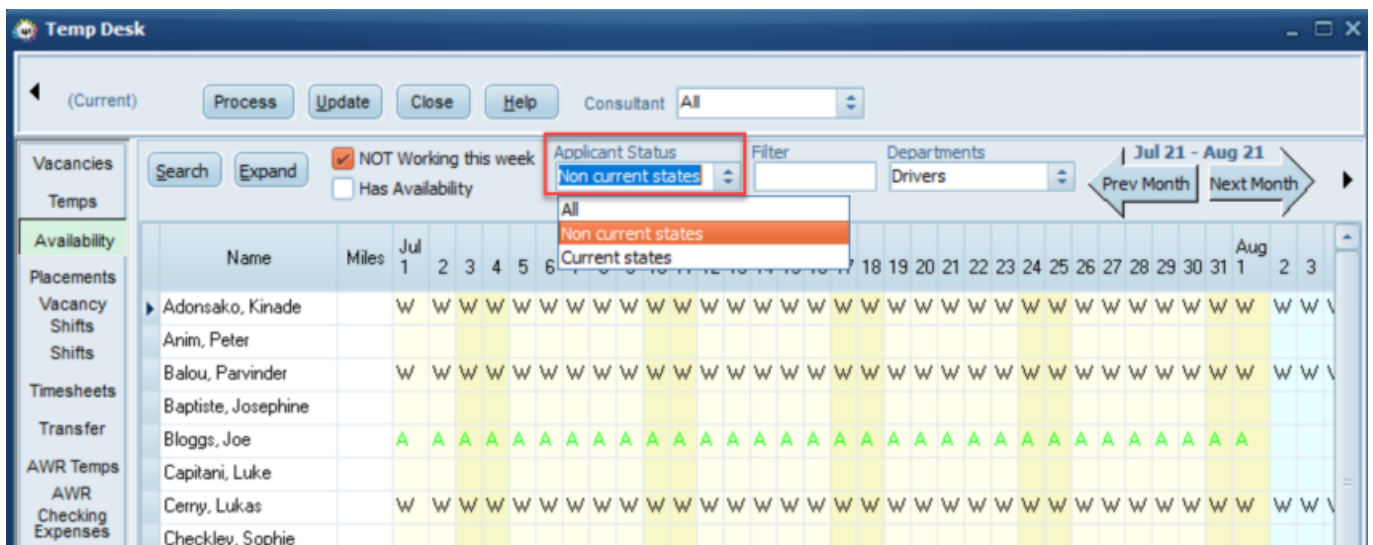
Postcode Radius searching has been added to the Temp Desk Availability and Vacancies views. Enter a postcode and the mileage radius from the specified postcode for matching records to be returned. The postcodes have to be valid and in a recognisable format.

In the Vacancies view if the vacancy has a site postcode address it will pick that up in place of the vacancy address.



## Temp Desk Availability - Ability to search for Non-Current candidate states

On the Availability view on the Temp Desk it is now possible to show candidates that are in pre-determined 'Non Current States' that have been set.



This feature requires system administrator setup.





## Temp Desk - Count of hours distinguishes between special placements

On the Temp Desk Timesheets view in count of hours per day if a candidate has 2 special placements in one vacancy and shifts attached to each, the count now distinguishes between them instead of showing in both.

Number	Batch + PO Ref	Paid to - Ref and Name	Temp Desk	Payroll No.	Temp	Account Code	Company	Job Title	Comment	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Select	Dispt Date
Provisional		1	Drivers	30049	McMullen, Scott	XM5001	A & M Stephens	builder		8.5	8.5	8.5					<input type="checkbox"/>	
Provisional		1	Drivers	30049	McMullen, Scott	XM5001	A & M Stephens	builder				8.5	8.5	8.5	8.5		<input type="checkbox"/>	

## Add Custom columns on Temp Desk Compliance and Expiry Date views

In addition to the other areas of the Temp Desk where you can already add custom columns it is now possible to add up to 3 custom columns on both the Compliance and Expiry Date views on the Temp Desk. Once added these custom columns will also be sortable.

Please contact IQX Support if you wish to add these columns.

## Timesheet Signing - Ability to see email address timesheet was sent to

If Timesheet signing is enabled by your agency this process has been enhanced so you are now able to see the client email address a timesheet was sent to, while its still in the provisional (pink) stage.

Temp Desk	Payroll No.	Temp	Account Code	Company	Job Title	Comment	Dispatch Date	Dispatch Method	Image File	Signing Detail	Image Approved
Drivers	30029	Parker, Jeff	529	A & M Stephens & Sons	Waiting Staff				No Link	Sent to :scott.mcmullen@iqx.co.uk at 15/09/21 16:46	<input type="checkbox"/>

For assistance with setting this up please contact IQX Support.

## Global Default Rate Scheme - E-Timesheets

For E-Timesheets to be created a Rate Scheme with a Rate Script attached must be used in the vacancy in order to calculate the break down of hours according to hours, times and days of the week.

To help with this process you can create a 'Global Default' Rate Scheme which will be used on any new Temp Vacancy that is created if there is no client default. It can always be overridden in with another scheme if the script calculation rules need to be different.

This feature requires system administrator setup and IQX support should be contacted for advice.



## **Shift Cancel Reasons - Merge option**

A reason can only be deleted if it has never been used so to 'loose' a reason you can now merge it into another one where you cannot actually delete.

To do this you would go to Maintenance>Temps Setup>Shift Cancel Reasons. You would then select the one you wish to delete and when you press delete you can then offered which one you want to merge it into.

This can be audited but needs to be activated by a System Administrator.

## **Availability Reasons - Merge option**

A reason can only be deleted if it has never been used so to 'loose' a reason you can now merge it into another one where you cannot actually delete.

To do this you would go to Maintenance>Temps Setup>Unavailability Reasons. You would then select the one you wish to delete and when you press delete you can then select which one you want to merge it into.

This can be audited but needs to be activated by a System Administrator.

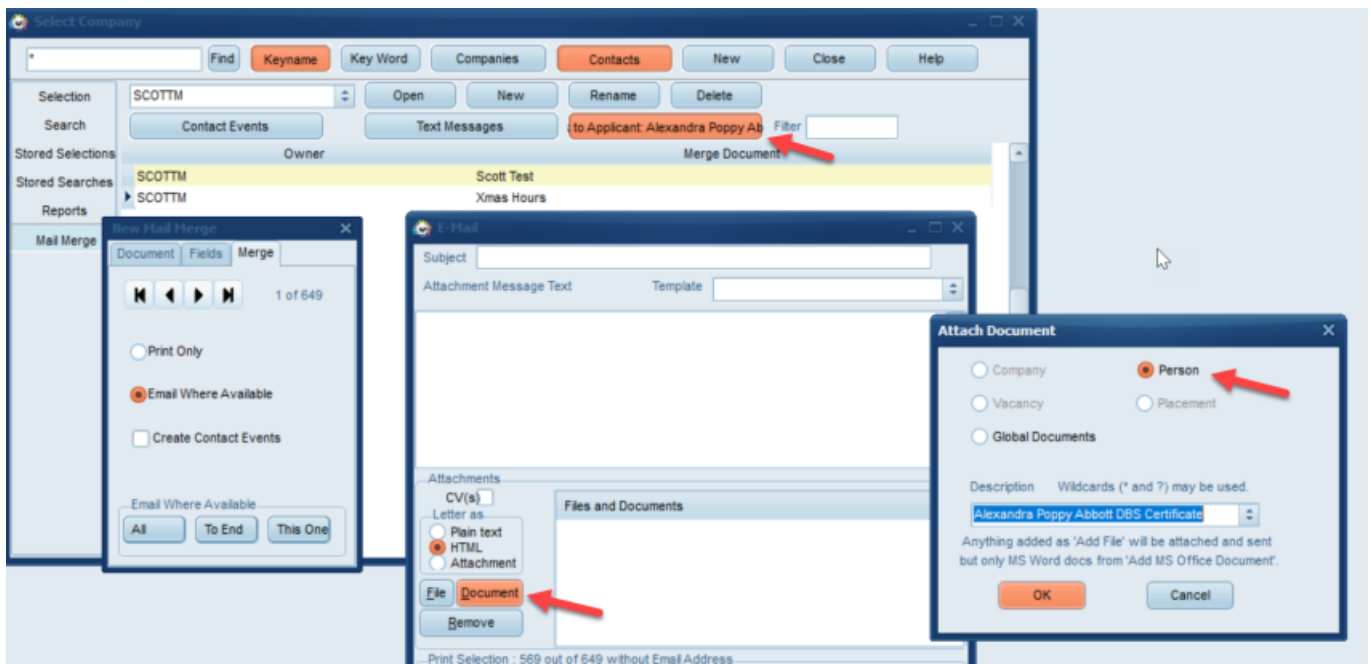
## **Ability to launch the notification user interface from a job**

Added the ability to invoke the powerful notification engine from jobs, so that, among other things, it can be launched from a candidate or company selector for the selected people and with notification text generated in the job.

This Feature requires system administrator setup. For assistance with setting this up please contact IQX Support.

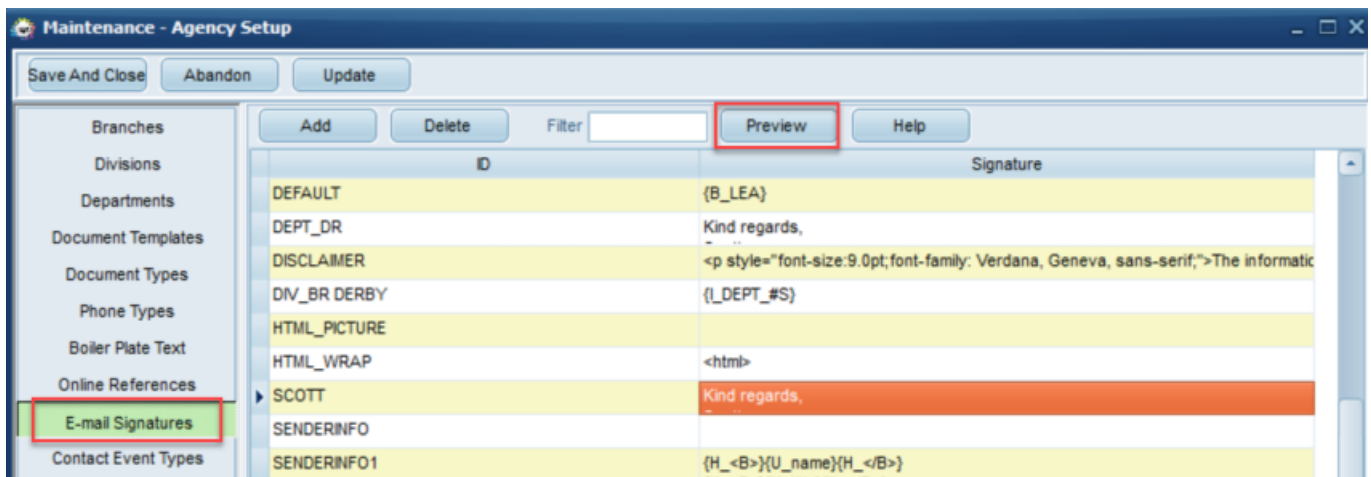
## **Client contact mail merge with linked applicant**

When sending a mail merge to a client contact that has a linked applicant you can attach documents that are on the person /applicant record when sending via email. If you click on the Documents button there is now an option to select Person documents to add as an attachment.



## Email Signatures - preview button

In the email signatures section it is now possible to preview the email signature. This is particularly useful when you are drafting it and you can see the general layout etc. This is similar to the preview functionality on notifications.



## 'System Only' Consultant logins possible

Users that exist just to be associated with automatic jobs can be set as a System Only user.

On the Company, Person and Vacancy selector - Contact Event drop down menu defaults to 'All excluding System' but 'All including System' is the first option on the drop down list



**Alexandra Poppy Abbott**

Score 67%

Help | Reports | Register | Delete | Search | GDPR | Subscribed to Marketing mailings | Change to Un-Subscribe

**Temp** | Division: BR Derby | Name: Alexandra Poppy Abbott | State: Current | Available: 16/11/2016 | Personal: Male 73 | Home Phone: 01632 299 284 | Day Phone: 01 | Mobile: 12121 | E-mail: Alexandra\_Abbott@iqxdemo.co.uk | Payroll Email Ad: ...

Expand | Contact Type: All | Own Type: No | Consultant: excluding Sys | Limit To: All | Process

Consultant	Contact Type	Date	Time	Conta	Link
SCOTTM	Other	23/09/2021	09:06	Scott Test	
SCOTTM	Confirm	23/08/2021	13:06	Scott Test	
SCOTTM	Availability Notification	03/08/2021	08:29	Availability Notif	
SCOTTM	Confirm	15/07/2021	11:49	personpack	
SCOTTM	Confirm	13/07/2021	09:43	personpack	
SCOTTM	Confirm	12/07/2021	11:00	personpack	
SCOTTM	Confirm	25/06/2021	14:16	personpack	
SCOTTM	Confirm	25/06/2021	14:12	personpack	
SCOTTM	Confirm	25/06/2021	14:09	personpack	
SCOTTM	Confirm	25/06/2021	13:47	personpack	
SCOTTM	Confirm	22/06/2021	15:10		

## Email address added to initial screen when viewing list of users

User email now appears in the Select Users screen. You do not need to click onto a user to see it.

**Select Users**

Login Name \* | Find | New | Close | Help

WARNING! There are active Users without passwords, click here to find them | Bulk Edit Field | Bulk Add Role | Bulk Remove Role

Include Not in Use | Expand | Count | Message to Users | Bulk Broadbean Details | Update

Login Name	Name	Job Title	E-mail	Department	Branch	Division
CRAIGWILSON	Craig Wilson		craig.wilson@test.co.uk	Events	Derby	BR Leicester
DEMO	Demo User	Consultant	vhs@accorddemo.uk	new new industr...	Nottingham	Extra Div to
IQXWEB	iqxWEB	jobless	scott.mcmullen@iqx.co.uk	Drivers	Derby	BR Leicester
REGISTER	Register			Construction new	Leicester	Legal Recr
SCOTTM	Scott McMullen	Support Manager	scott.mcmullen@iqx.co.uk	Events	Derby	BR Derby
STEWART	DEMO - Stewart Bain	Consultant		Construction new	Derby	BR Derby
TEST	Test		scott.mcmullen@iqx.co.uk	Drivers	Derby	BR Derby
VHS	Testing 2192 - Viola ...	Consultant	vhs@accorddemo.uk	Drivers	Derby	123456789

## Count button added to current vacancies and extra vacancies

To easily determine how many Vacancies are listed in each view a 'Count' button has been added to



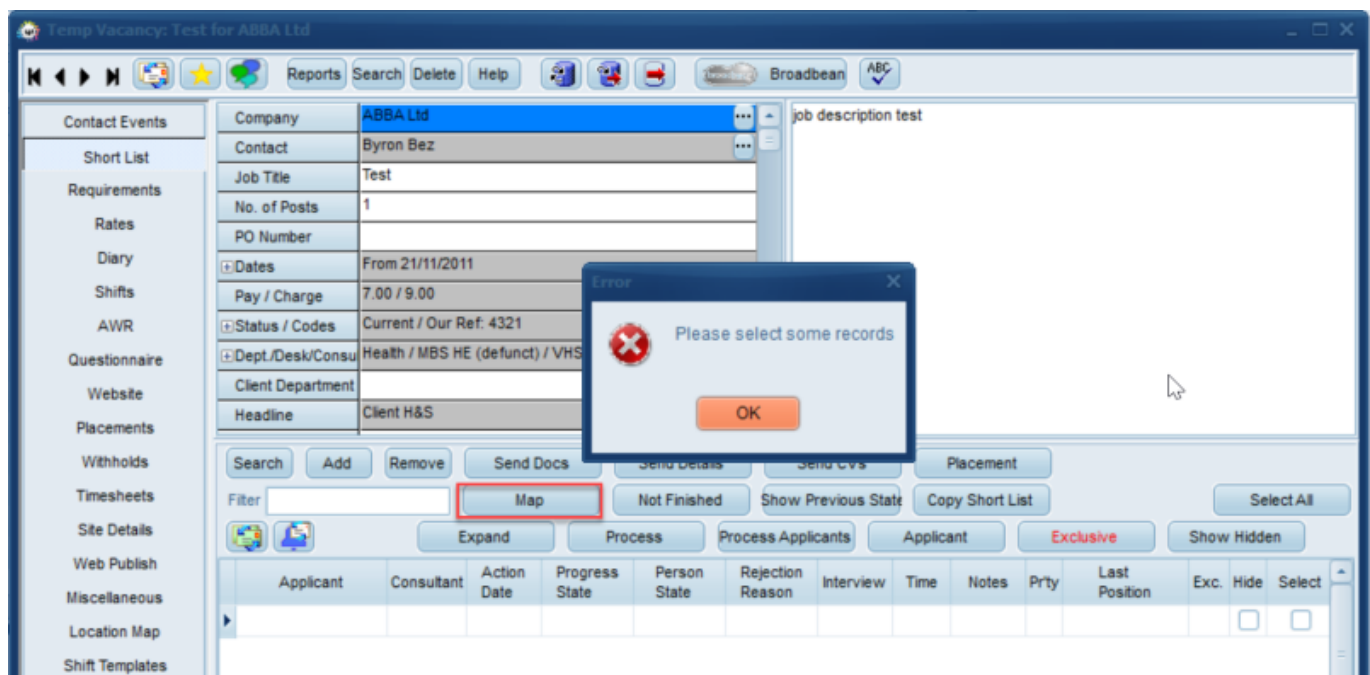
both the Current Vacancies and Extra Vacancies views on the Desktop.

The screenshot shows the 'Desk Top' application window. On the left is a sidebar with navigation options: Daily Work List, Diary, Diary List, Inbox, Progress due for Action, Interviews, Contact Events due for Callback, Current Vacancies (highlighted with a red box), Tracked Vacancies, Scott Test Vacancies (highlighted with a red box), Placements, Reports, and Backup Log. The main area displays a table of vacancies with columns: Select, Consultant, Department, Town, Company, Contact, Job Title, Salary Pay, PO Number, and a final column with values 0, 0, 0, 1, 1, 0, 0, 1, 0, 1, 0, 1, 2. The 'Count' button in the top toolbar is highlighted with a red box.

Select	Consultant	Department	Town	Company	Contact	Job Title	Salary Pay	PO Number	
<input type="checkbox"/>	SCOTTM	new new indus	EDINBURGH	10 Group PLC	Brian Roger Dicks	Test		12345	0
<input type="checkbox"/>	SCOTTM	construction	Edinburgh	A & M Stephens	A Stephens	Labourer	10.00		0
<input type="checkbox"/>	SCOTTM	Drivers	Edinburgh	A & M Stephens	A Stephens	Scott Test 1	10.50		0
<input type="checkbox"/>	SCOTTM	Events	Edinburgh	A & M Stephens	june brown	test			1
<input type="checkbox"/>	SCOTTM	Drivers	Edinburgh	A & M Stephens	Ralph Black	SM Test 8	10.00	1111	1
<input type="checkbox"/>	SCOTTM	new new indus	Edinburgh	A & M Stephens	Scott Abbott	Ground Worker	10.00	12345	0
<input type="checkbox"/>	SCOTTM	Events	Edinburgh	A & M Stephens	Scott Abbott	Scott Test Job			0
<input type="checkbox"/>	SCOTTM	new new indus	Edinburgh	A & M Stephens	Alan McMullen	Test SM	8.10	12345	1
<input type="checkbox"/>	SCOTTM	Drivers	Edinburgh	A & M Stephens	Scott McMullen	builder	8.00		0
<input type="checkbox"/>	SCOTTM	Drivers	Selkirk	AWR NOTA	Peter Jones	Drivers Mate			0
<input type="checkbox"/>	SCOTTM	new new indus	London	Beale & Co.	Andy Jones	Coffee Maker		12345	1
<input type="checkbox"/>	SCOTTM	Construction ne	London	Beale & Co.	Andy Jones	bricklayer	12.00	12345	0
<input type="checkbox"/>	SCOTTM	Drivers	London	Career Legal Ltd.	Paul Knight	SM Test			1
<input type="checkbox"/>	SCOTTM	Drivers	Lillesleaf	IQX Limited	Scott McMullen	Support Team Admin		1234	2

## Meaningful error message when clicking on Maps button

If on a vacancy shortlist that has no candidates and you click on the 'Map' button to show the candidates location as well as the vacancy location this now displays a more meaningful error message rather than the previous SQL error.





## Fixes

- Issue with doc packs not being included as attachments when sending email has now been fixed.
- If the Division has sales branding enabled the invoice prefix box is now visible when creating an invoice from the Company>Account view.
- Issue fixed where notifications screen failed to display after a DB dis-connect and you are prompted to re-connect.
- If you have a person selected on the Availability view on the Temp Desk and select Make Reminder this now links to the selected person.
- If you filter a selection of records and run a report, click on map or mail merge it now obeys the filtered selection.
- Issue with commas in timesheet filenames causing problems with invoice PDF creation fixed.
- Internal chat / Collections and Incoming SMS now obey divisions allowed when displaying grid results.
- Fixed error relating to tax method not being entered when entering payroll number.

From:

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

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[https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release\\_2.21.08&rev=1633348315](https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release_2.21.08&rev=1633348315)

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