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Release 2.21.08

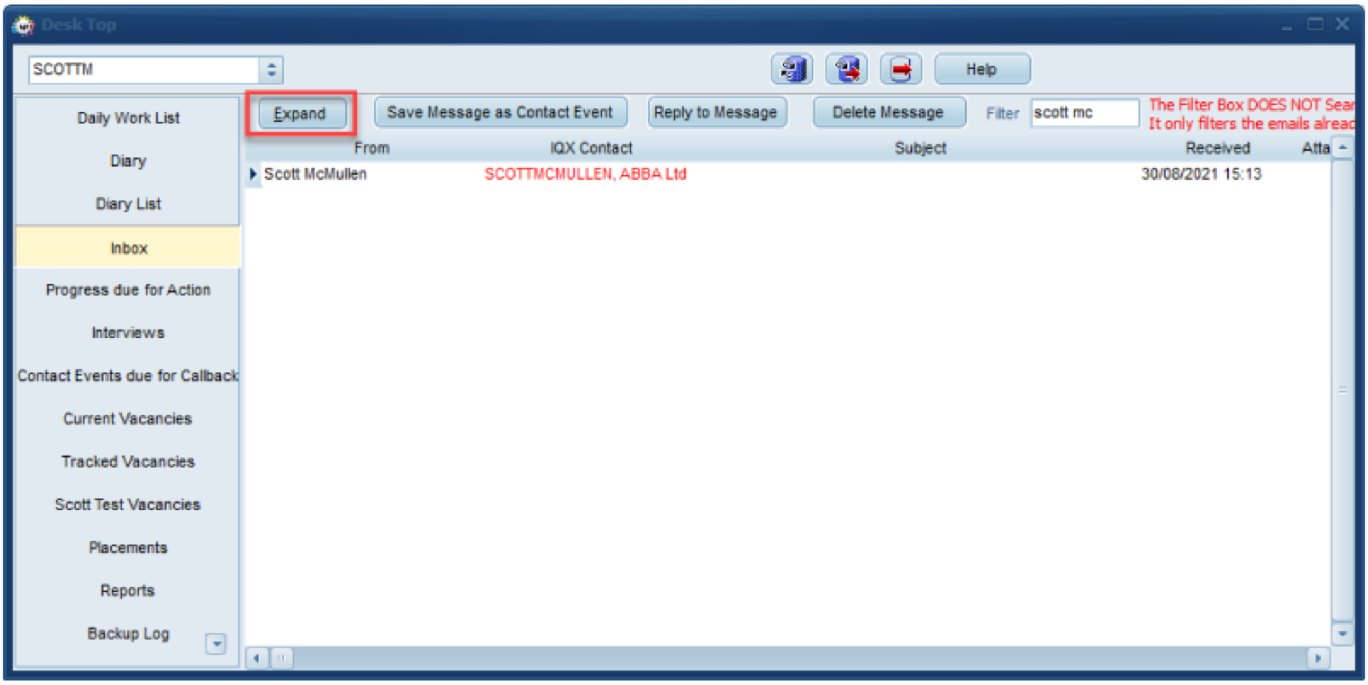
If you have custom forms defined in IQX, not all new features may be available to you. Your agency custom forms are shown on Help – About.

FEATURES

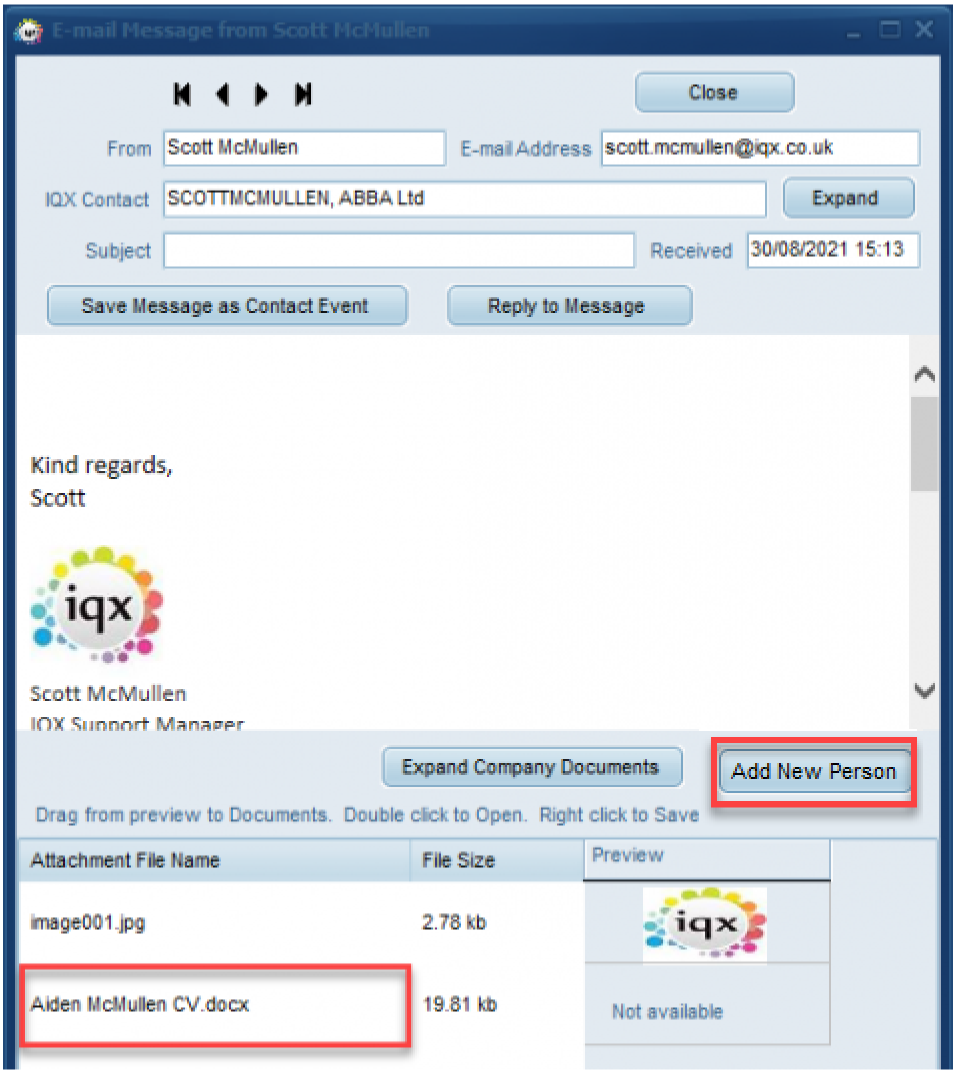
Start the New Person Wizard directly from IQX Inbox

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.



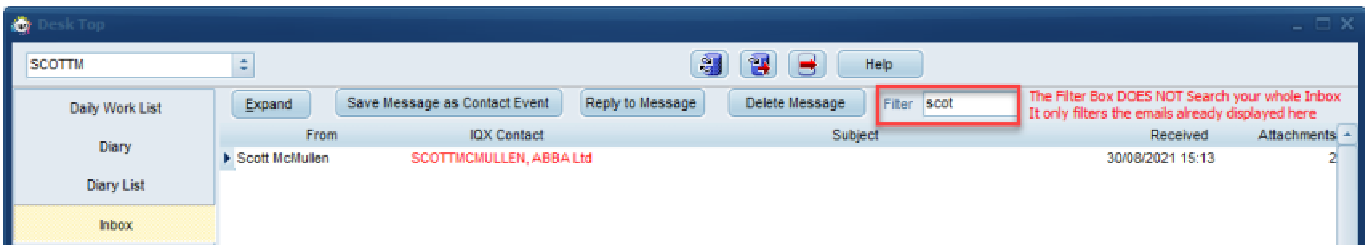
Click on the required CV / Document to select it. Once you have clicked on the CV to select it click on the 'Add New Person' button.



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.

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

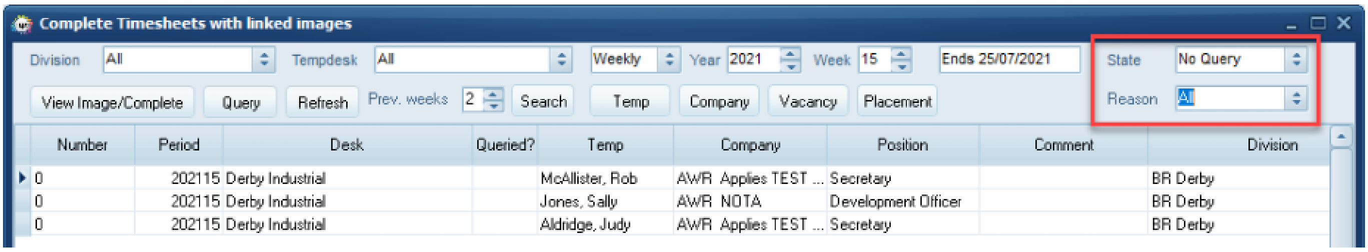
If there are multiple candidates in a short list - e.g. that have been invited to interview and their progress status reflects this and they have an interview date and time specified, it is now possible to send all interview information to the client under one notification (using the progress merge fields)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

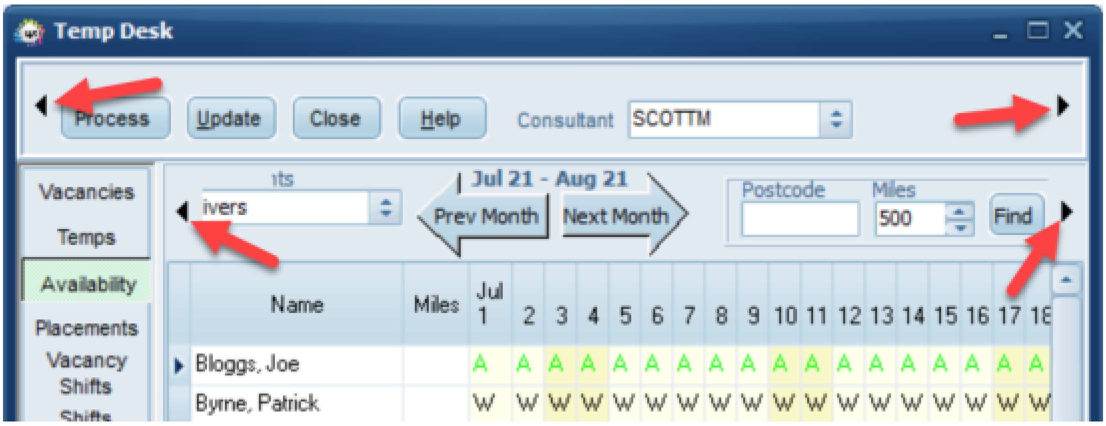
Reasons section.



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.

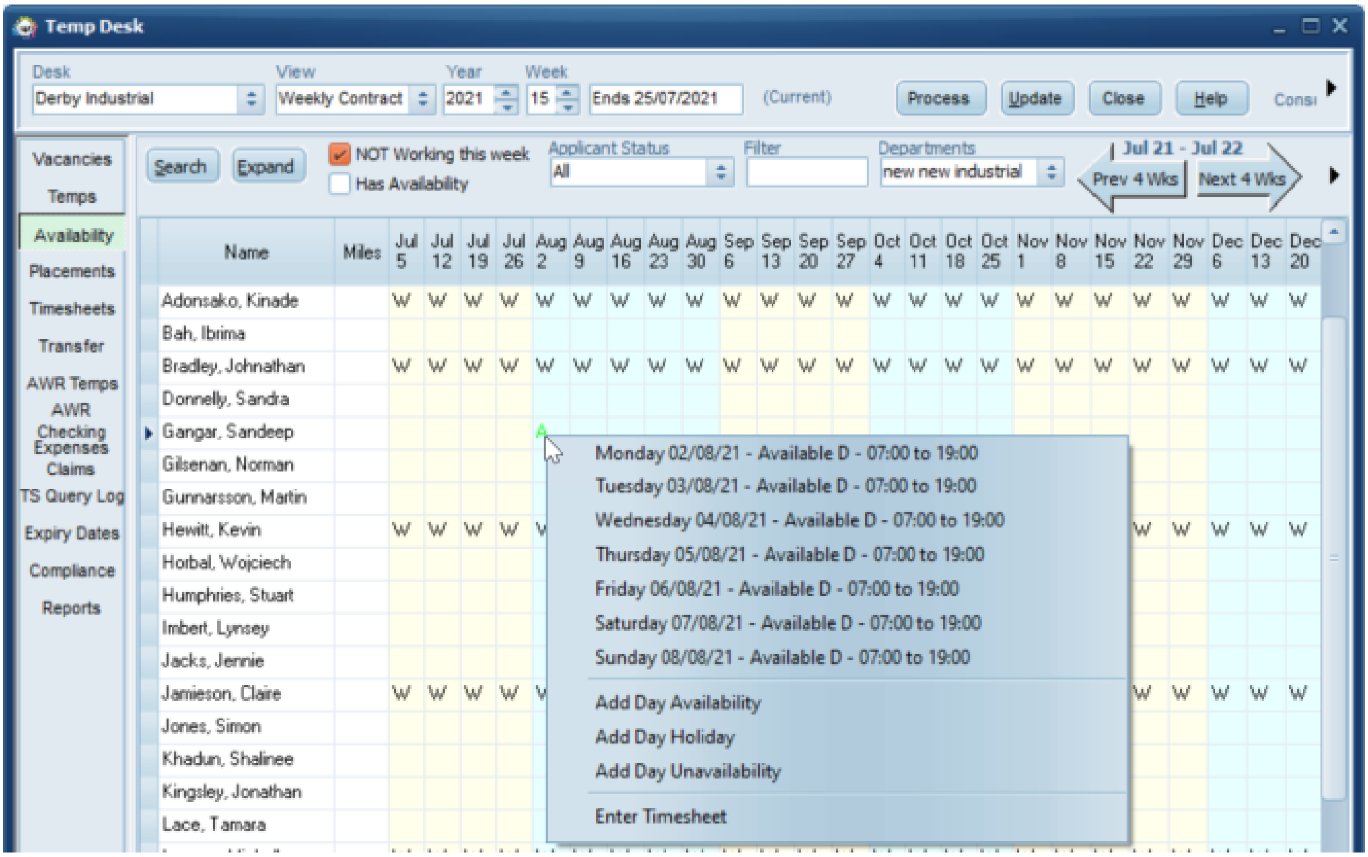
To combat this we have added scroll arrows on the top panel header and also for some of the views headers. At present we have only been able to add this for the following:
Vacancies, Temps, Availability, Placements, Vacancy Shifts, Timesheets, Expiry Dates and Compliance.



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

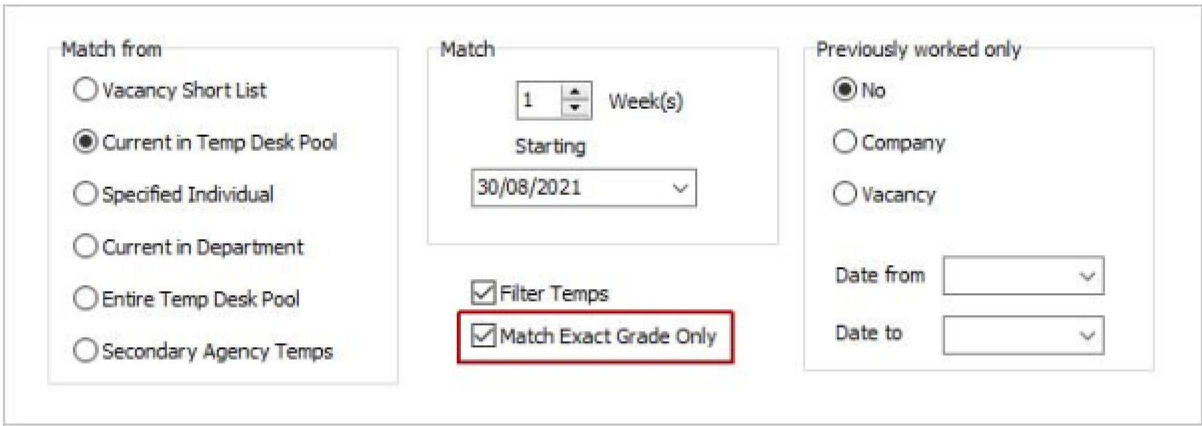
On the Availability view for a Contract desk on the Temp Desk only the first day of each week is shown.

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.



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'



User Role that allows provisional timesheet creation without Accounts role

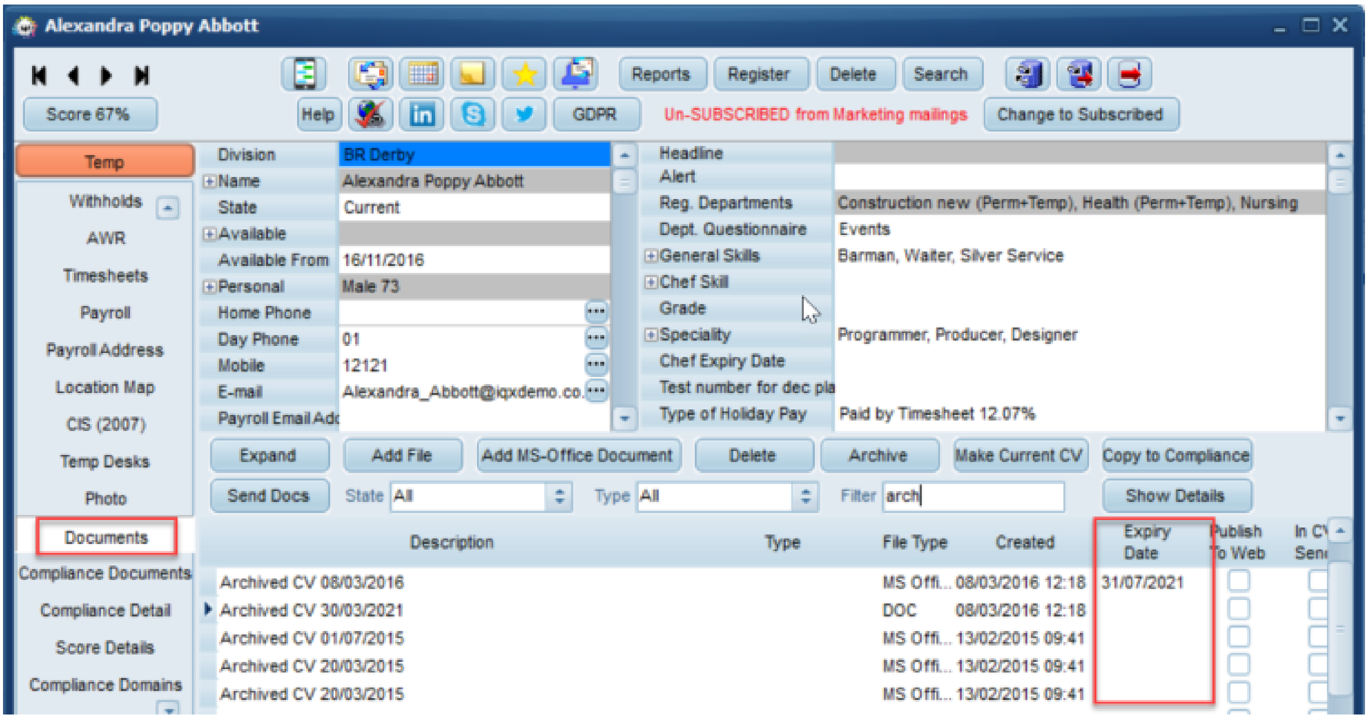
A new user role has been added that will allow users that have it enabled to create timesheets even if they do not have the Accounts role.

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.

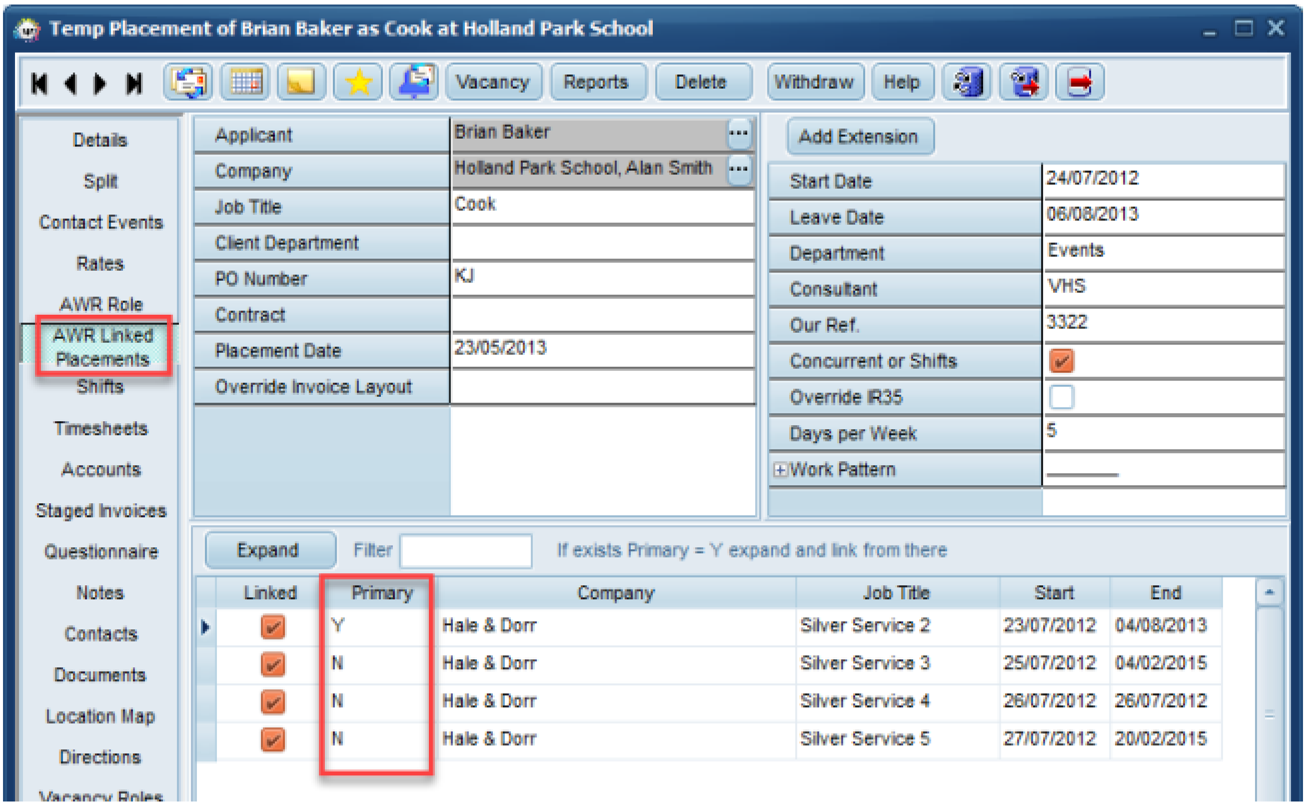


Because this would not be useful for all agencies this is switchable and would need to be activated by a System Administrator.

AWR Linked Placements - Identifying the primary placement

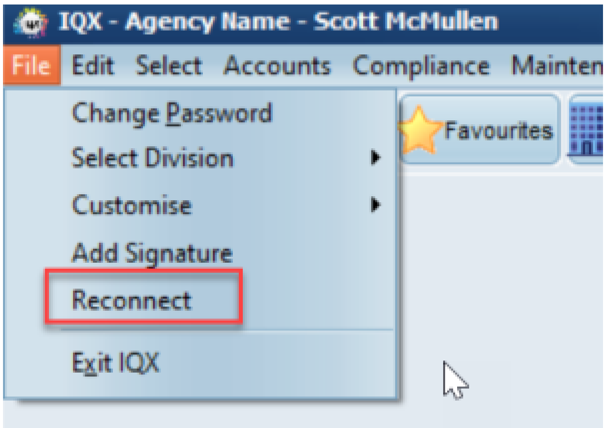
Where placements already exist and have been linked through an LE Code, the Primary record will be displayed with the Y, those that are linked will be N, making it easier to identify the one they are linked to.

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



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.

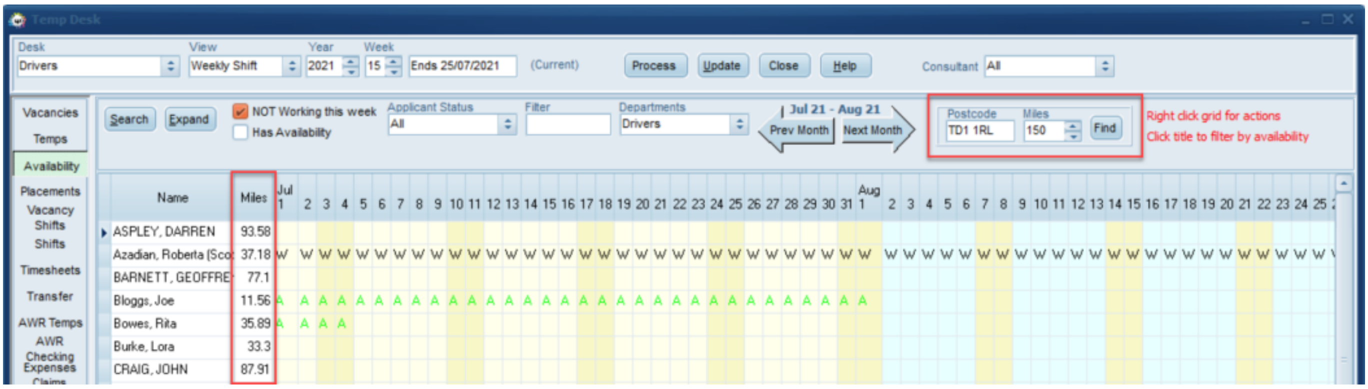


ENHANCEMENTS

Postcode Radius Searching added to Temp Desk Availability and Vacancies Views

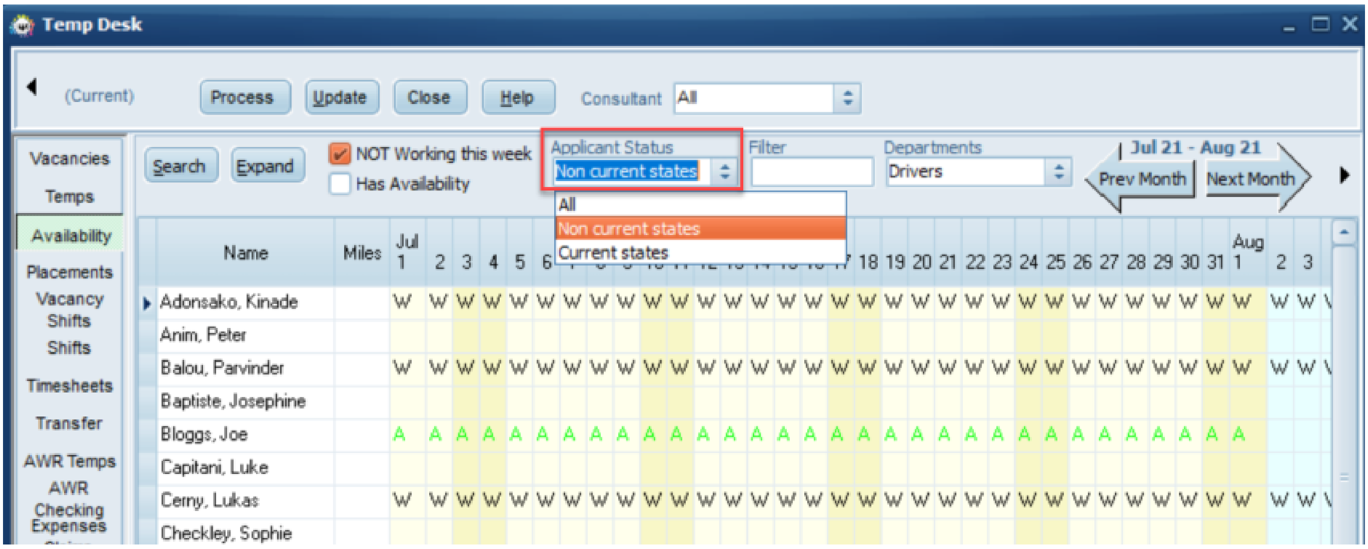
Postcode Radius searching has been added to the Temp Desk Availability and Vacancies views. Enter a postcode and the mileage radius from the specified postcode for matching records to be returned. The postcodes have to be valid and in a recognisable format.

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

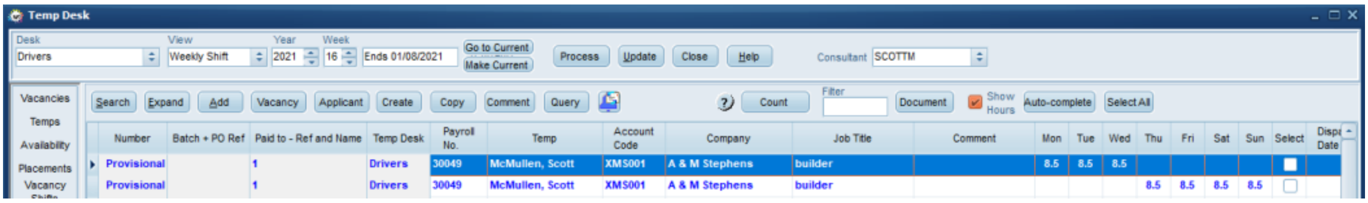
On the Availability view on the Temp Desk it is now possible to show candidates that are in pre-determined 'Non Current States' that have been set.



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.



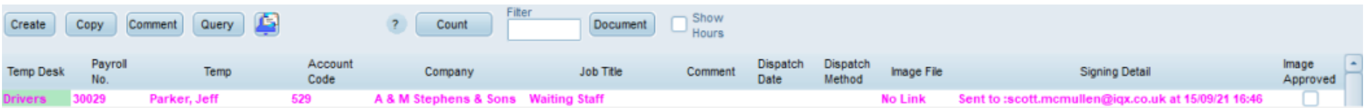
Add Custom columns on Temp Desk Compliance and Expiry Date views

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.



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 'lose' 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 'lose' 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.

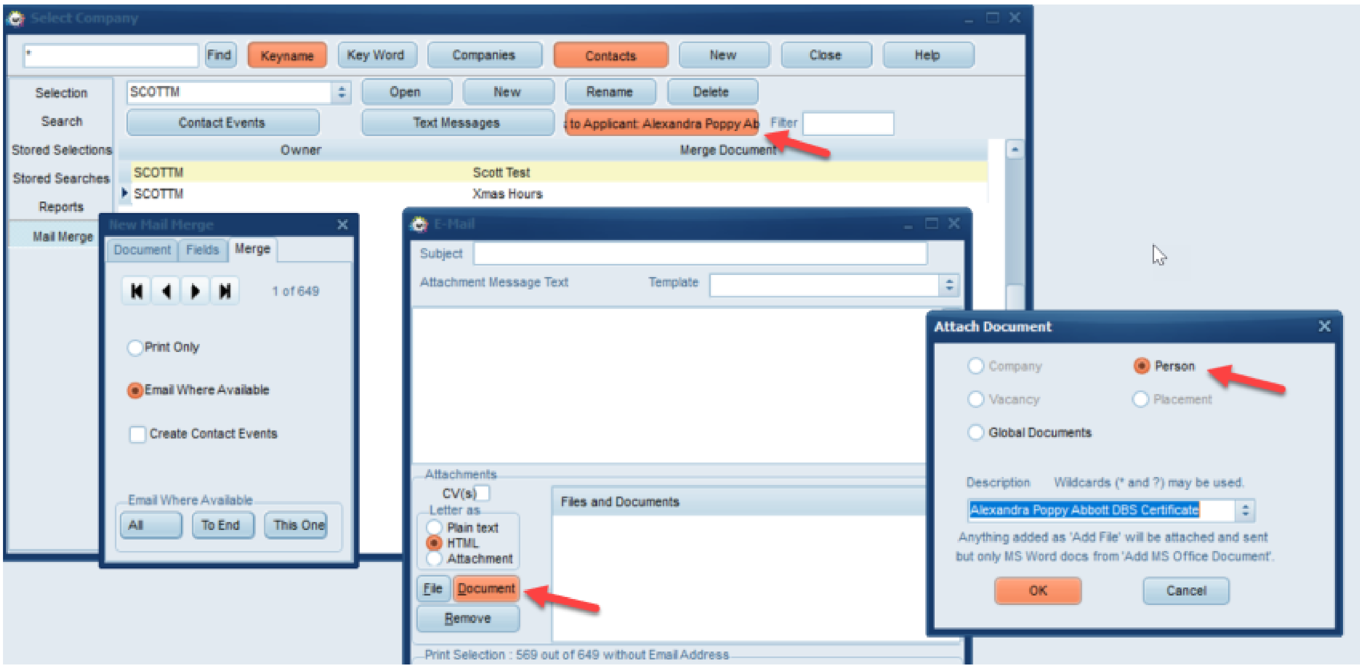
Ability to launch the notification user interface from a job

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.

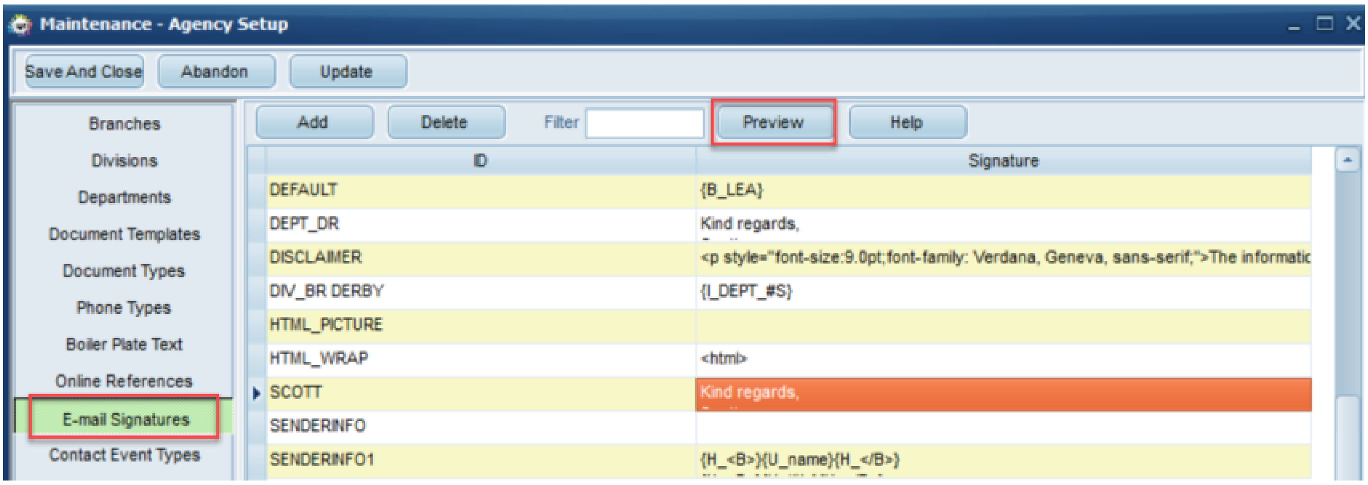
Client contact mail merge with linked applicant

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

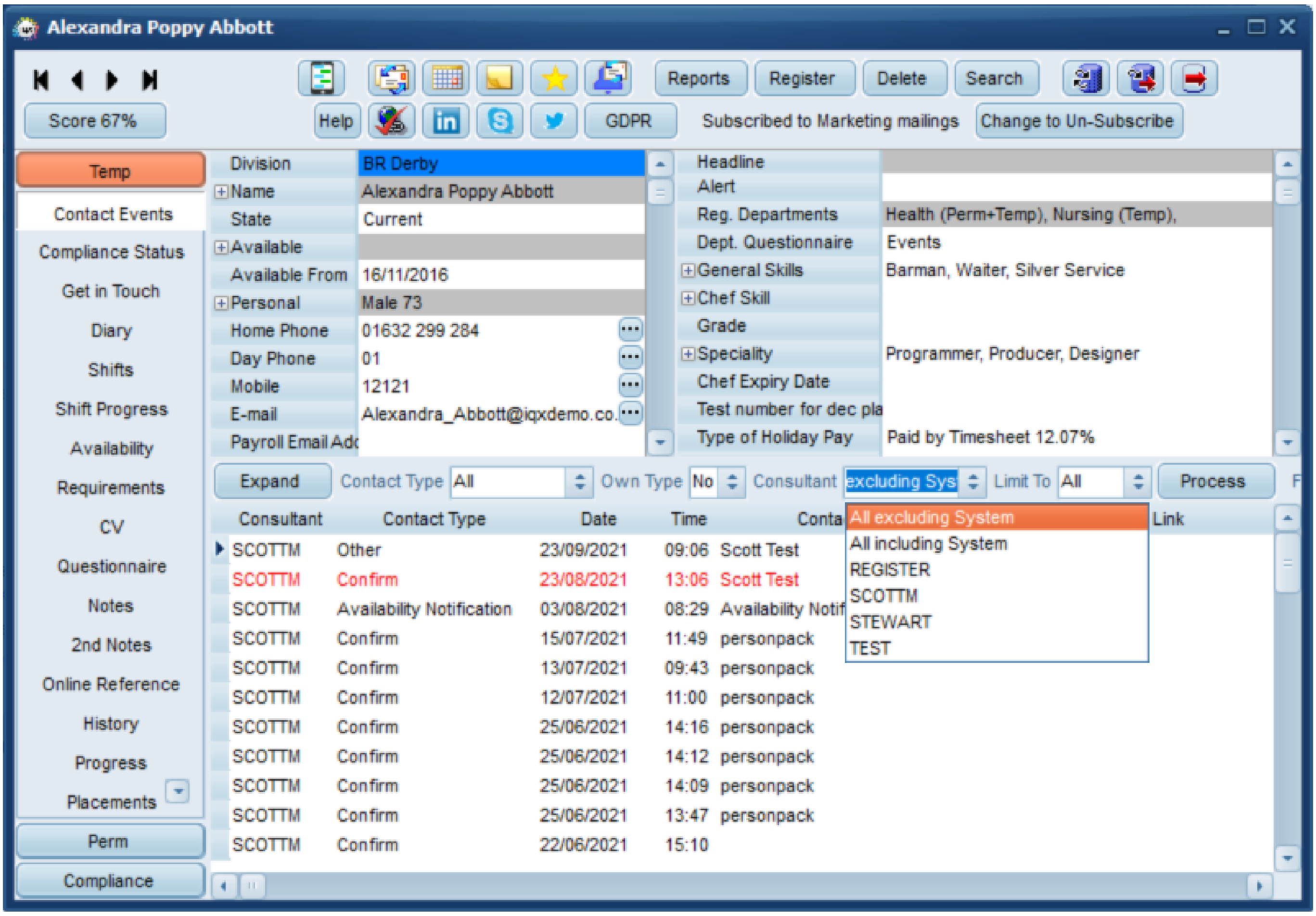
In the email signatures section it is now possible to preview the email signature. This is particularly useful when you are drafting it and you can see the general layout etc. This is similar to the preview functionality on notifications.



'System Only' Consultant logins possible

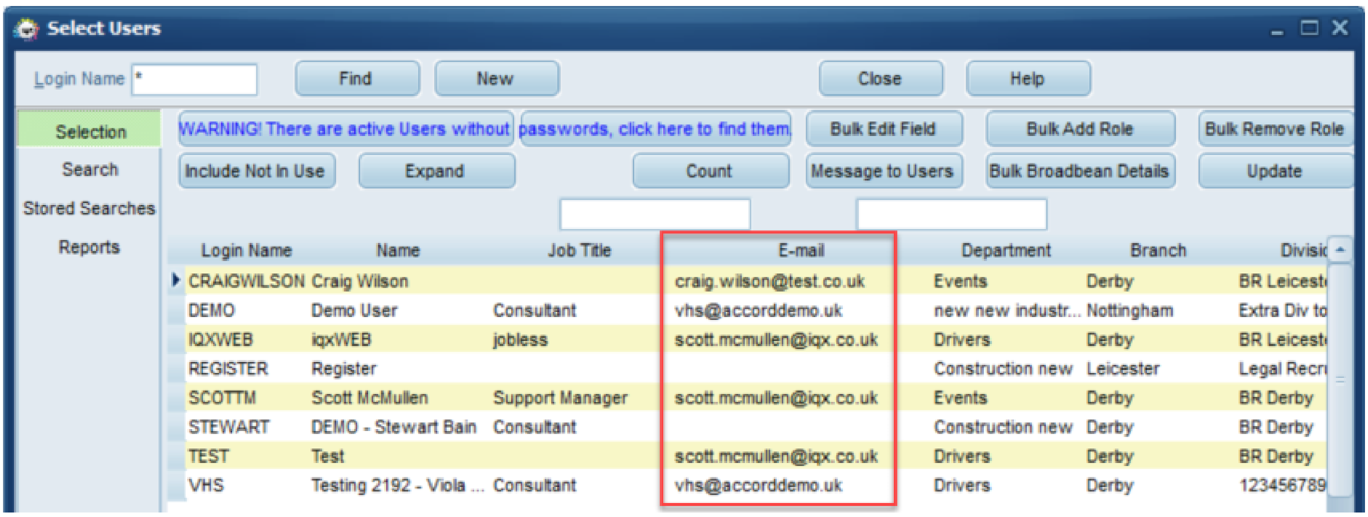
Users that exist just to be associated with automatic jobs can be set as a System Only user.

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



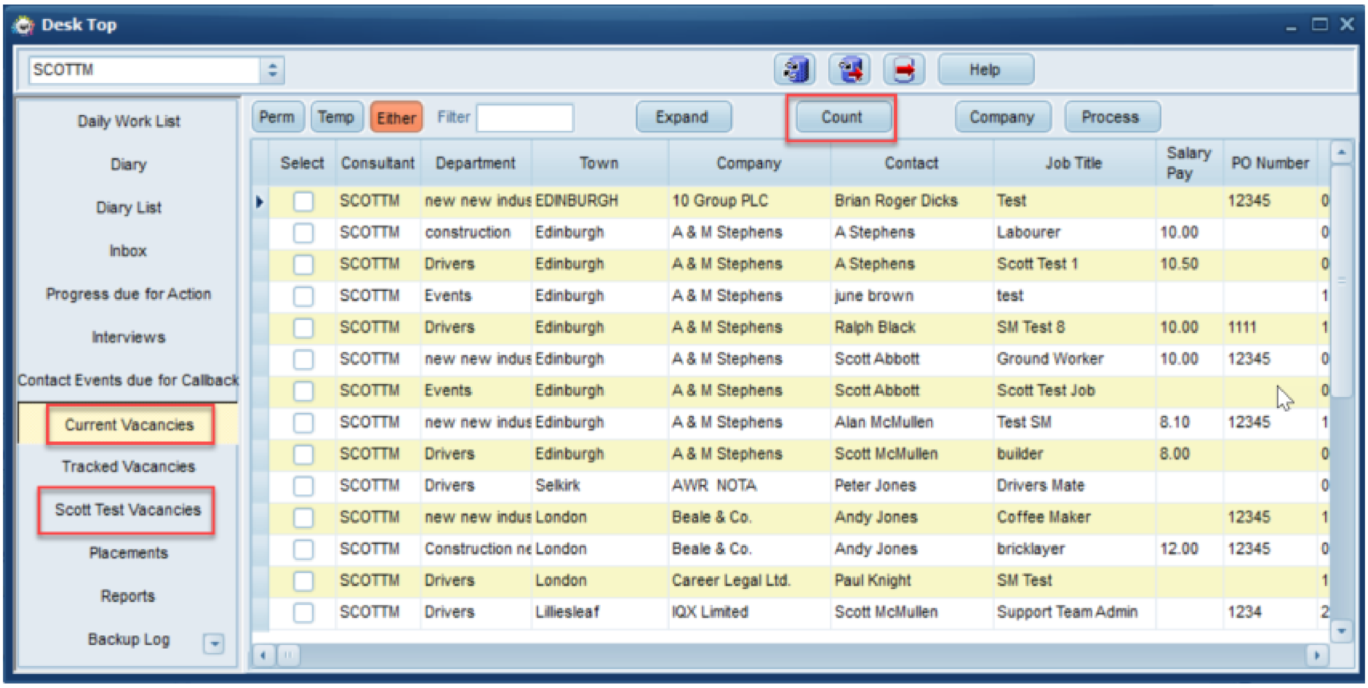
Email address added to initial screen when viewing list of users

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



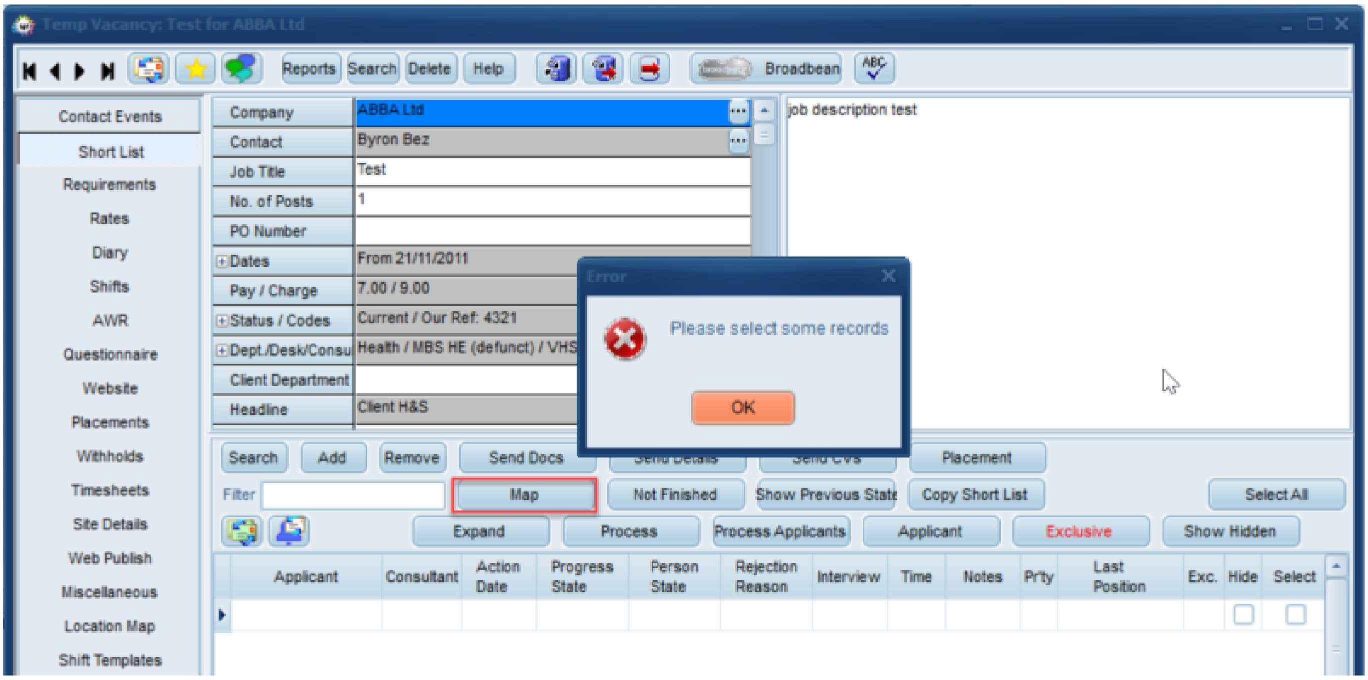
Count button added to current vacancies and extra vacancies

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.



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.

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