

## **Release 2.22.02**

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

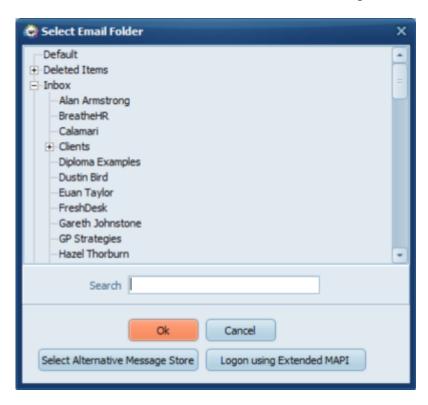
## **FEATURES**

#### **Desk Top - Inbox Improvements**

Change Folder - When accessing the Inbox via the Desk Top there is a new button 'Change Folder'.

😧 Desk Top							- 5	⊐ ×
SCOTTM	*			🗿 强 📑 Help				
Diary List	Expand	Save Message as Contact Event	Fetch Limit Fetched	Filter on Fetched Records Folder	Search Exte	rnal Mailbox		
Inbox	Exhaug	Reply Delete	50 12	Change Folder Goto I	Default	Search Upd	late	
Progress due for Action		From IC	X Contact	Subject		Received	Attachments	

When pressed this will allow the user to select an inbox sub folder to view in the inbox. However this folder will be the default for the next time the user goes to the Inbox.





**Note**: This is NOT available for Users set up for new Exchange Web Services.

**Search** - When accessing the Inbox via the Desk Top there is a new button 'Search'. Users can type into the box and then hit the search button to return emails related to the search. Please note this does not search on all folders, only the specified folder and the search is not live searching when you enter each letter, it only starts when the button is pressed.

🕞 Desk Top					
SCOTTM	*			🗿 😫 📑 Help	
Diary List	Expand	Save Message as Conta	Fetch Limit Fetched	Filter on Fetched Records Folder	Search External Mailbox
Inbox	Tobaug	Reply De	lete 50 12	Change Folder Goto Default	Search Update
Progress due for Action		From	IQX Contact	Subject	Received Attachments ~

**Fetch Limit & Fetched** - Fetch Limit and Fetched have been added to the Inbox. This allows users to vary the number of emails that will be 'fetched' from the selected folder (inbox or other selected folder). The Fetched then displays how many emails are being displayed. In the below example the number of emails in the selected folder is lower than the fetch limit, hence the difference in the numbers.

Please note that the maximum you can set the fetch limit to is 200 and it is worth noting that the higher this number is the more time it will take for the emails to load as each one is checked to match IQX records.

😋 Desk Top							- 🗆 X
SCOTTM	*			🗿 😫 📑 🛛 Hel	lp I		
Diary List	Expand	Save Message as Contact Event	Fetch Limit Fetched		Folder nbox	Search External Mailbox	
Inbox	Expand	Reply Delete	50 12		Change Folder Goto Default	Search Update	
Progress due for Action		From IQX	Contact		Subject	Received Atta	chments -

**Saving Attachments** - Once an email has been expanded, the instructional text on how to save attachments have been highlighted in red text to make it more visible.

# Managers can create Ops Teams for managing Temp Desk Placements and Temps Views

Managers can now create 'Teams' within IQX and manage Candidates/Temps and Placements on the Temp Desk filtered by a specific 'Team' where they can view the specified records and run reports on just the Team.



Consultant	VHS	~		
Filter		– IQX – PERM – REGISTER – STEVE	^	
e 02 1		STEWART VHS		Fri 18/02
5	E C	Ops Team		7.5
5		Edinburgh Team	~	7.5
5	7.5			

This feature requires System Administrator setup.

## Booked Holiday and Absence will show against a Contract Placement and Timesheet

When adding holiday or unavailability to the Availability view on a Person Record when they are currently working in a contract placement, it will now auto update the Placements view, the Availability view and the Timesheets view on the Temp Desk to show the setup reason i.e. HOL, ABST.

Expand	Show: Active in Per Awaiting Tim	riod hesheet for Period	Vacar	icy <u>App</u>	licant	Enter	Timeshee	<u>1</u>	Count:		] F
Position	Company	Temp	Start Date	Leave Date	Mon 14/02	Tue 15/02	Wed 16/02	Thu 17/02	Fri 18/02	Sat 19/02	Sun 20/02
Staff Ward 2	Habstead Group PLC	Kubasiewicz, Laura	25/01/2021		7.5	7.5	7.5	7.5	7.5		
Staff Ward 2	Habstead Group PLC	Langan, Michelle	25/01/2021		7.5	7.5	7.5	7.5	7.5		
Staff Ward 2	Habstead Group PLC	Neale, Amanda	29/03/2021		7.5	7.5	7.5				[]
Administrator	Vinson & Elkins	Bemowska, Kamila	22/01/2021		HOL	HOL	7.5	ABST	7.5		

The Unavailability reasons will also show on the timesheet in place of the hours, if Show Hours is ticked.

Search E	xpand Add	<u>Vacancy Applic</u>	ant <u>Create</u>	Comment	Query	2 <u>Count</u>	File	ter		Docum	ent	Hor She	ow
Number	Payroll No.	Temp	Account Code	Company	Position	Comment	Mon	Tue	Wed	Thu	Fri	Sat	Sur
V37	80 NEW	Bemowska, Kamila	V123	Vinson & Elkins	Administrator		HOL	HOL	7.5	ABST	7.5		
V37	81 NEW	Gomes, Maria	X0HA09	Habstead Group PLC	Staff Ward 2		7.5	7.5	7.5	7.5	7.5		
V37	82 NEW	Kubasiewicz, Laura	XOHA09	Habstead Group PLC	Staff Ward 2		7.5	7.5	7.5	7.5	7.5		

This feature requires System Administrator setup.

#### Ability to Select the Department for Certain Selectors

A new User role has been added that will allow users that have this role assigned to select a custom department from the file menu to be used where departments have custom columns on Selectors.



2024/04/24 04:55	4/15
🔄 🙀 IQX - Agency Name - Scott McMulle	n
File Edit Select Accounts Complia	nce Maintenance Window Help
Change <u>P</u> assword Select Division	tes Companies Scontacts People
Selector Custom Department	<ul> <li>Drivers</li> <li>Drivers</li> </ul>
Customise	Events
Add Signature	
Reconnect	Name Key Words
E <u>x</u> it IQX	Selection All Except Contacts 8

Please note that only departments that have custom questions will show in the list and the list is also restricted to obey the users divisions allowed access. This is available on the Person, Company and Placement selectors. Once a department has been selected from the list on the file menu when you open the Person selector the caption states which department it is and you will see any Custom Columns that are specific to that Department based on the selector you are viewing.

🗟 Select Person	(Columns for Drivers)								_ 🗆 X
Name	Key Words CV		Eind	Quick Lookup	Fast New	• (	Close	Help	
Selection	All Except Contacts & Arch	Filter	Expand	Map	Count	Update 📩 🚔	Bulk Email	Send Docs	Self Doc
Search	Name	State	Last Contact	Alert	Consultant	Address		Town	-
Stored Selections	•								
Stored Searches									
Reports									
Mail Merge									
Bulk CV Import									

This feature requires System Administrator setup.

### **Create from Vacancy Stored Search a Global Person Default**

By setting up a Vacancy departmental stored search with the description starting 'Global Person default...', e.g. 'Global Person Default Industrial' the system will now pull this through into the Requirements tab on the Person Record that can be used to search for vacancies. Set up the search without filling in the criteria so that can be set per person. Only set up one per department.

This feature requires System Adminstrator setup



#### Sending Checklist reports from Person record asks for Vacancy Link

Normally document packs are sent from a vacancy shortlist, as a result the underlying code knows about the Vacancy ID etc.

If the document pack is generated from a person record, the checklist report could still need details from the vacancy so it will now prompt the user to select the relevant Our Ref from the dropdown. Cancel will allow this step to be skipped.

This means the checklist report can still pull the required details from the vacancy even if it is generated from the person record.

### Reports can have editable fields

Editable fields can now be added into the Report Builder, allowing the ability to free type into the cells when exported to PDF format. Can be saved as Read Only to ensure no further editing can take place.

For assistance with this feature please contact IQX Support.

## **ENHANCEMENTS**

#### **Notification Improvements**

There have been a number of Enhancements to Notifications:

1. Attach Checklist Reports and Documents and set a contact event type directly instead of through functions.

2. Attach a photo thumbnail to body of notification and specify width and height.

- 3. Attach a list of colleagues booked for the same day, and details of a nominated 'leader'.
- 4. Create Custom Word Merge fields for shifts.
- 5. Allow body of Notification to be saved as a pdf in Documents.



These features require System Administrator setup in the Templates.

#### Notifications - Manually attaching client documents

With linked companies when sending a notification and attaching a document you can now select from all linked company documents or only the company documents you are on.

By setting general setting 3330 - Allow docs to be attached from Company Group to 'N' you can switch off being able to see all linked company documents.

#### **Collections Improvements**

In collections you now have drop down filters, limited to the users connected to the chats.

The below picture shows the filter that you would use to filter by either the owner of the collection or someone that is listed as a user within the Collection.

😋 Desk Top											
SCOTTM		- +			3	Help					
Collections		Expand New Arch	ive Status Active		• User in Ch	at Al 🔹	Filter		Delete	Help	
		Name	Collections Type	Unread	Latest Chat	Who Created	Date From	Date To	When Created	Who Archived	When Archi
	Þ	Invoices for Review	Invoice	0	29/04/21 08:35	SCOTTM	01/02/2021	30/05/2021	30/03/21 14:02		
		Test1		0	26/04/21 14:46	SCOTTM	31/03/2021		31/03/21 08:41		
		Test 8	Invoice	0	26/04/21 14:42	SCOTTM			31/03/21 11:43		
		Test Collection	Leads	0	31/03/21 09:26	SCOTTM	01/03/2021	25/04/2021	30/03/21 11:24		
		Test 1		0		SCOTTM			31/03/21 09:56		

🧑 Desk Top SCOTTM • a 🔋 😑 Help User in Chat All Filter Expand New Archive Status Active Delete Help Collections When Collections Latest Chat Who Date Date Unread Invoices for Review 01/02/2021 0 29/04/21 08:35 SCOTTM 30/05/2021 30/03/21 14:02 Invoice Test1 0 26/04/21 14:46 SCOTTM 31/03/2021 31/03/21 08:41 Test 8 Invoice 0 26/04/21 14:42 SCOTTM 31/03/21 11:43 Test Collection 0 31/03/21 09:26 SCOTTM 01/03/2021 25/04/2021 30/03/21 11:24 Leads Test 1 SCOTTM 31/03/21 09:56

The below picture shows the filter that allows you to filter by the people that have contributed to the chat.

New columns show how many users are in the chat and the number of documents attached to the chat.



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🜒 Desk Top									_ 0
SCOTTM	*			📱 📑 🛛 Help				• •	
Collections	Expand New Arc	hive Status Active	- Use	r in Chat All	• Fiter	Delete	Help		
	Name	Collections U Type	Inread Later Chat	t Who Created	Date From	Date When To Created	Who Wh Archived Arc	ten Users chived in chat	Attached Records
	Invoices for Review	Invoice	0 29/04/21	8:35 SCOTTM	01/02/2021 3	0/05/2021 30/03/21 14:02		2	2 4
	Test1		0 26/04/21	4:46 SCOTTM	31/03/2021	31/03/21 08:41		1	0
	Test 8	Invoice	0 26/04/21	4:42 SCOTTM		31/03/21 11:43		1	0
	Test Collection	Leads	0 31/03/21	9:26 SCOTTM	01/03/2021 2	5/04/2021 30/03/21 11:24		2	3
	Test 1		0	SCOTTM		31/03/21 09:56		0	0 0

Users with access to Internal Chat / Collections are now able to double click on the line to open it rather than having to click on the Expand button.

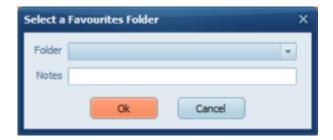
Styling and sizing improvements have also been made particularly within the questionnaire section.

#### Add a selection of highlighted records to Favourites

You can now make a selection of records to add Favourites via the new yellow star button rather than dragging one record at a time. This can now be done from the Person, Company and Company Contacts selectors. The new star button asks you to specify the folder in Favourites.

•	Find Keyn	ame Key	y Word C	Companies	Contacts	New Clo	se Help	
Selection	Clients and Prospects	- D	xpand	Count Co	ntact Tree	Map Upd	late	
Search	Filter Quick	Lookup		•	Process			
ored Selections	Company	State	Last CE	Last PI Start Date	Code	Alert	Address	
tored Searches	A & M Stephens	Client		20/12/21			19 Albany Street	
Reports	A M Best Europe - Rating	Client		22/04/21	A3 X21321	Viola test Morgan Spend	e 12 Arthur Street	
	ABBA Ltd	Client		29/11/21	A1 XBBA01		SM Test	
	ABBA Ltd	Client			A1 XBBA01		SM Test 2	Е
	ABBA Ltd	Client		10/02/20	A1 524	Test Alert SM	63 New Street	Li
	ABBA TAXIS	Client		12/04/21	A1 X00507		63 New Street	
	<ul> <li>ABC Contract Services Ed</li> </ul>	Client		17/04/14	A1 XBC001		18 Corstorphine Road	
	ABC Contract Services Wa	Prospect			A1 XBC001		Unit 6, Wolsey Park	То
	ABC Contracting Services	Client		16/09/11	A1		41a Thistle Street Lane S	w

When this is pressed you get to choose which folder within Favourites these go to.





#### Person Selector buttons rearranged

On the Person Selector the view has been reorganised due to new buttons: the Favourites, Notify, Bulk Email, Send Docs, Self Doc Pack have been moved onto a second line to enhance visibility.

All Except Contacts & Arch 🗸 CATHER		Expand M	lap Count	Update
🛨 📮 Bulk Email Send Doc	Self Doc Pack			

#### Availability view - Create a linked reminder for Contact Date

On Availability view of a person, click on Enter Availability/Unavailability, on either form it will be possible to select "Create Diary Reminder" and set the date, once the date comes it will generate a notification for the user.

Pattern					
Monday	07:00	/ 19:	00 D Day 07:00 -19:00	~	
🗹 Tuesday	07:00	19:	D Day 07:00 -19:00	~	Monday to Friday
Wednesday	07:00	/ 19:	D Day 07:00 -19:00	~	-
🗹 Thursday	07:00	19:	00 D Day 07:00 -19:00	~	Every Day
Friday	07:00	19:	00 D Day 07:00 -19:00	~	Clear
Saturday				~	
Sunday				~	

#### Added Company State as column on Person History view

On the history view on a person record when you add an employment from an existing company we have added a column that shows the company state. This will help to ensure that the correct company is added to a record.



ect Company							×
*	Find Existin	Add New	Select	Cancel			
Company	Status	Address		Town	County/City	Postcode	Divisior -
Ktrakter Ltd.	Prospect	Watling House	33 Cannon Street	London		EC4M 5SB	
Young Samuel Chamber	Prospect	Y S C Building	50 Floral Street	London		WC2E 9DA	
Scott McM Test	Secondary A						BR Der
Kleboe	Prospect	15-19 York Place		Edinburgh		EH1 3EB	BR Der
AWR Applies TEST CHA	Client	city Road		Melrose		TD6 9HH	BR Der
AWR NOTA	Client	House		Selkirk		TD5 3KK	BR Der 🖘
AWR Unknown	Client	Hut		Galashiels		TD1 2JK	BR Der

### 2-way SMS Improvements

If available, 2-way SMS has been improved. Spacing has been harmonised. A new button has been added to the Incoming SMS area of the Desk Top to quickly and easily view the incoming SMS.

#### Ability to set a Default new Company status

A new general setting has been added that allows you to set a Default state for new companies other than 'P' Prospect.

This feature requires System Administrator setup.

# Placement and Vacancy Add Rate buttons not available when Enforce Margin check activated on Temp Desk

When 'Enforce Margin Check' is activated on a desk , the vacancy and placement, 'Add Rate' and 'Delete rate' buttons are greyed out, preventing incorrect rates being added or deleted.

#### Validation on Extension of a Placement

Placement Extensions now call the placement pre validation function to ensure all is in order before allowing the extension.

# Temp Desk Availability view - Contract Desk - Show work pattern in front of Availability

On Person Availability view, Temp Desk Temps and Availability views it now reflects the Candidates working pattern i.e. if they are working Mon, Wed, Fri this will show as 'W' on their Availability leaving

Tue, Thur, Sat, Sun showing 'A' for available (providing availability has been entered) Historically every day would show as 'W' regardless of the candidates working pattern.

Only Match if Availability Entere	d	Er	iter.	Ava	ilabi	lity	Bo	<u>ook</u>	Shi	<u>fts</u>	Er	nter	Ho	liday	ł	<u>Ent</u>	er L	Ina	/aila	abili	¥	<u>Ci</u>	<u>ear</u>		Las	at Ye	<u>ear</u>	N	ext'	Yea	1
Month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	3
April 2021	A	A			W	W	W	A	A			W	W	W	A	A			W	W	W	A	A			W	W	W	A	A	
			1000		100	1.1	1	111	1			\$201				1	1.00	1.00	2.4.1		-	1			100/11	2.6.5					

### Signed Timesheets show who signed the Timesheet

If a Timesheet has been completed using the signing method the 'Entered' Field on the completed timesheet now shows who signed the timesheet rather than 'WEB User Identified'.

#### Delete N Do Not Transfer New Timesheet Help A 🎫 🛋 Document Query Extra 12345 Bridget Jones ... . Temp Details XMS001 A & M Stephens .... Client Shifts Support Assistant ••• Job Title Linked Timesheets PO Number12345 Site. Galashiels References Image EV3496 Timesheet Number Questionnaire W 202137 Period From 20/12/2021 to 26/12/2021 Signatures Dates 1 Payroll Company Analysis Code 20/01/2022 13:26 By Mr Scott McMullen Entered Deservation Dataile Click in View column to see Location Signature Type When Signed Who View Position Notes Iocate --- Client Manager 20/01/2022 13:26 Mr Scott McMullen ipaddress=84.69.

### Allow editing of an Account Name before the first invoice has been created

Historically you could only edit the account name after the first invoice had been created. With this enhancement it is now possible to edit without the need to create an invoice. This is for Xero Accounts users where Accounts Codes are not used, only Account Names.

### Adding Global Documents now filtered by Division and Department

When attaching Global documents in emails the documents that show now obey the Division access set at the User level. If a Global Document is set for a specific Division or Divisions, it will not show on the list if the User does not have access to that Division.



#### Save a report as a PDF to Documents and Compliance Documents

If a report is run against a person, e.g. an ID badge, it is useful to save this as a PDF to be reused rather than rerun the report.

If enabled by your agency you can save a report as a PDF to the Documents view and also Compliance Documents view on a Person record if you have Compliance rights. This is in addition to being able to Print and Save to File. You can also add to the Documents view on Company, Placement, Progress and Vacancy. Please note this can only be done if the report is generated from an individual record, it will not work on the selector screens.

For reports that have had this feature added there is a new button that will show in the report that allows the saving of the report as a PDF or Save to File.



This feature requires System Administrator Setup.

#### **Online Reference Request allows saving to Compliance Documents**

Online reference report can now be saved to documents, compliance and file. 2 Buttons now at top of report:

Blue Arrow = Export - Save to file

Red Arrow = Save to Documents or Compliance Documents

Reference Request		_ = ×
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#### Editing a Report remembers file type

When you are editing a report in a reports selector that has a file type of xml - when you click on Browse the default file type now matches the original file type. Previously it would always default to showing files of the type rtm.



#### Role to access iqxWEB Setup on Maintenance menu

A new user layout setting has been added that will allow users that have the role 'Can administer IQXWeb users' to Maintain the iqxWEB Admin User without having Full Maintenance Rights. Once the new layout setting has been added users will see an option in the Select menu for 'iqx Web Maintain Admin User'.

This feature requires System Administrator setup.

## Fixes

- When adding a Candidate through the Fast New person wizard the Temp Desk options now obey the selected department rather than the Users default department.
- Person Timesheet view was slow on loading, this has now been fixed.
- An issue was identified where you could no longer drag from the person selector to a vacancy short list, this has now been fixed.
- If a CV in PDF format is uploaded to CV section of a Person record, when pressing Save As it was saving it in DOC/DOCx format. Now when saved it is in PDF format.
- When a list member is unsubscribed in Mailchimp they are set as Unsubscribed when reimporting to IQX.
- On favourites all notes are visible again.
- Data within Folders now correctly displayed on Favourites.
- Shift rates were not displaying correctly in notifications when combined with other merge fields, this has now been fixed.
- Issue with Email Subject set in Notifications not pulling through and defaulting to the description of the notification has been fixed.
- When sending a timesheet notification to more than one person it was sending to the first email address multiple times and not the other people this is now fixed and will now send to all the separate email addresses.
- When sending out Document packs to the Client, the sort order set in the Document Pack was not being obeyed. This has now been fixed.
- On a Vacancy where there are several shifts the system was running slow when trying to change from the Shifts view to the Diary view. An issue found within the SQL code which has now been fixed.
- You could not save Composite Co Pay Companies if you did not have 'Company Name' as a field, this has now been fixed.
- When selecting a new accounts contact from the accounts pop out window, the new contact name would not show in the box, instead the old name would still be there. This has now been amended and the new contact name shows in the box after selection.
- When adding a new date question the expiry lead time can now be entered on the form.
- When running the Job to complete Authorised Timesheets it was producing an error, this has now been resolved within the database.
- If WebService used to complete timesheets (jobs) then fix for payroll number not being on first Timesheet.
- Error with shifts not showing in date order on Provisional timesheets has been fixed.



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- When selecting 'Save/Continue' on the Web Referencing this is making a unique code for the referee if there are multiple being sent out to the referees therefore ability to see the references clearer.
- Checklists now show based on the departments in the users Divisions Allowed access rather than only showing checklists associated with the users default department.
- Further action refreshed when Re-Connect is used checking the Divisions Allowed.

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