



# Release 2.3.4

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.

- [User](#)
- [Accounts](#)
- [System Administrator](#)
- [Fixes and Enhancements](#)

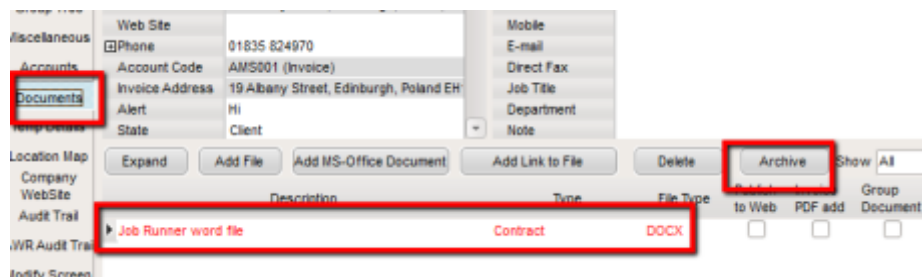
## Users

### New Ability to Archive

Documents can now be archived in all document views. Once archived the file text will turn red. These files will not be available when attaching documents to emails.

When viewing a range of documents it is possible to filter them by All, Archived or Live documents. The default is All.

To access this feature from any view – Documents – Select a file – Use the Archive button



### Alternative Form Background Colour

This feature allows the Company or Person form colour to be changed according to the record state.

To configure this feature – Maintenance - General settings – Search on 'colour' - switchable fields (2080 and 2085) – set the fields to Y – Click the Update button – Click on the Save and Close button.



The 'General Settings' window shows a table of settings. The 'Enable Company State Colours' option is checked, and the 'Background Colour' button is highlighted.

No	Group	Name	Value	Notes
490	Colours	Social Care Recipient Colour	8517805	
500	Colours	Social Care Contact Colour	8517805	
2080	Switchable Fields	Enable Person State Colours	Y	Set to 'Y' to enable Person State Colours. Set to 'N' to disable.
2085	Switchable Fields	Enable Company State Colours	Y	Set to 'Y' to enable Company State Colours. Set to 'N' to disable.

Set colours via Maintenance - Agency Setup - Person and Company States - Tick the Override Form Colour box. Use the Background Colour button to select a new colour.

Note: Using this feature overrides the new look colour palette when viewing a Person or Company record.

The 'Maintenance - Agency Setup' window shows a table of states. The 'Background Colour' button is highlighted, and the 'Override Form Colour' checkbox is checked.

State	Name	Order	Grid Order	Note	Background Colour	Font Colour	Override Form Colour
P	Prospect	10	10	Prospect	255	65408	<input checked="" type="checkbox"/>
C	Client	20	20	Client	16777215	0	<input type="checkbox"/>
I	Invoice Address	25	25	Inv Add	16777215	0	<input type="checkbox"/>
S	Supplier	30	30	Supplier	16777215	0	<input type="checkbox"/>
A	Secondary Agency	35	35	Secondary Agency	16777215	0	<input type="checkbox"/>
.	Archived	40	40	Deleted	16777215	0	<input type="checkbox"/>

The 'Select Person' window shows a list of people. Jane Bright is highlighted, and a red arrow points to her name.

Name	State	Last Contact	Alert
Ben Bratby	Current	16/03/2012	1
Jane Bright	Pre registr...	09/07/2012	1
Ayesha Brown	Current	16/03/2012	5
Jane Chloe Brown	Current	16/03/2012	1



## Alternative Font Colour on a Selector

This feature allows the Company or Person font colour to be changed according to the record state.

To configure this feature - Maintenance - General settings - Search on 'colour' - switchable fields (2080 and 2085) - set the fields to Y - Update - Click on the Save and Close button.

The screenshot shows the 'General Settings' window with the 'Search' tab selected. The search criteria are set to 'colour'. The table below shows the configuration for switchable fields 2080 and 2085, which are highlighted with a red box.

No	Group	Name	Value	Notes
490	Colours	Social Care Recipient Colour	8517805	
500	Colours	Social Care Contact Colour	8517805	
2080	Switchable Fields	Enable Person State Colours	Y	Set to 'Y' to enable Person State Colours. Set to 'N' to disable.
2085	Switchable Fields	Enable Company State Colours	Y	Set to 'Y' to enable Company State Colours. Set to 'N' to disable.

Set colours via Maintenance - Agency Setup - Person and Company States - Tick the override form colour column. Use the Font Colour button to select a new colour.

The screenshot shows the 'Maintenance - Agency Setup' window with the 'Person States' tab selected. The 'Font Colour' button is highlighted with a red box. The table below shows the configuration for Person States, with the 'Override Form Colour' column highlighted with a red box.

Code	Name	Order	Grid Order	Note	Publish To Web	Set On Web	Background Colour	Font Colour	Override Form Colour
C	Current	1	1	Currently looking for w...	<input type="checkbox"/>	<input type="checkbox"/>	16777215	0	<input type="checkbox"/>
P	Placed	2	2	Placed	<input type="checkbox"/>	<input type="checkbox"/>	16777215	0	<input type="checkbox"/>
L	Client	3	3	Client	<input type="checkbox"/>	<input type="checkbox"/>	16777215	0	<input type="checkbox"/>
I	Pre registration	4	4	Added - not enough de...	<input type="checkbox"/>	<input type="checkbox"/>	8300063	4259984	<input checked="" type="checkbox"/>
D	Not Active	6	6	Deleted	<input type="checkbox"/>	<input type="checkbox"/>	16777215	0	<input type="checkbox"/>
A	Secondary Agency	10	10	Secondary Agency Temp	<input type="checkbox"/>	<input type="checkbox"/>	16777215	0	<input type="checkbox"/>
N	Client/Candidate	11	11	ljkh	<input type="checkbox"/>	<input type="checkbox"/>	16777215	0	<input type="checkbox"/>
Z	Umbrella	20	20	Umbrella improt tests	<input type="checkbox"/>	<input type="checkbox"/>	16777215	0	<input type="checkbox"/>
.	Archived/DNU	99	99	Deleted	<input type="checkbox"/>	<input type="checkbox"/>	16777215	0	<input type="checkbox"/>

The screenshot shows the 'Select Person' window. The 'Find' button is highlighted with a red arrow. The table below shows the selection of a person.

Selection	Name	State	Last Contact	Alert
Ben Bratby	Current	16/03/2012	1627 Cu	
Jane Bright	Pre registr...	09/07/2012		
Ayesha Brown	Current	16/03/2012	56 Ivanh	
Jane Chloe Brown	Current	16/03/2012	1 Carrut	

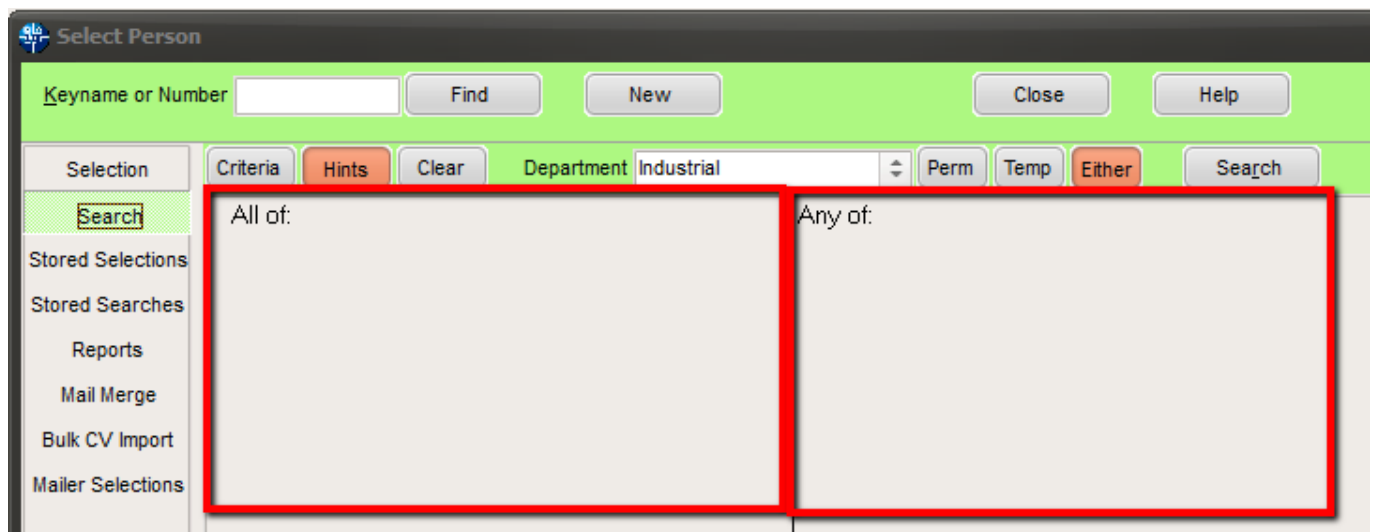


## Search Hints

Some users are unaware of the different search views on the search screen. Therefore, the hints function has been set on. The text can be temporarily hidden by clicking Hints button.

Permanently hiding the Hints require System Administrator configuration for each user.

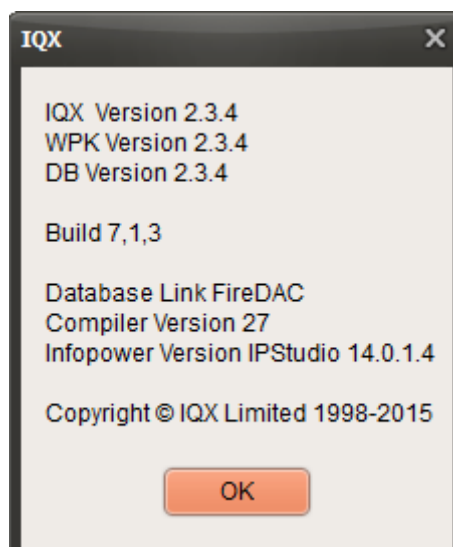
To access this feature - People - Search



## Increased information in the About Box

Information in the about box has been improved to display the first three digit Version numbers which changes when New Features are added and Build numbers which change when fixes and new builds are incorporated into the program.

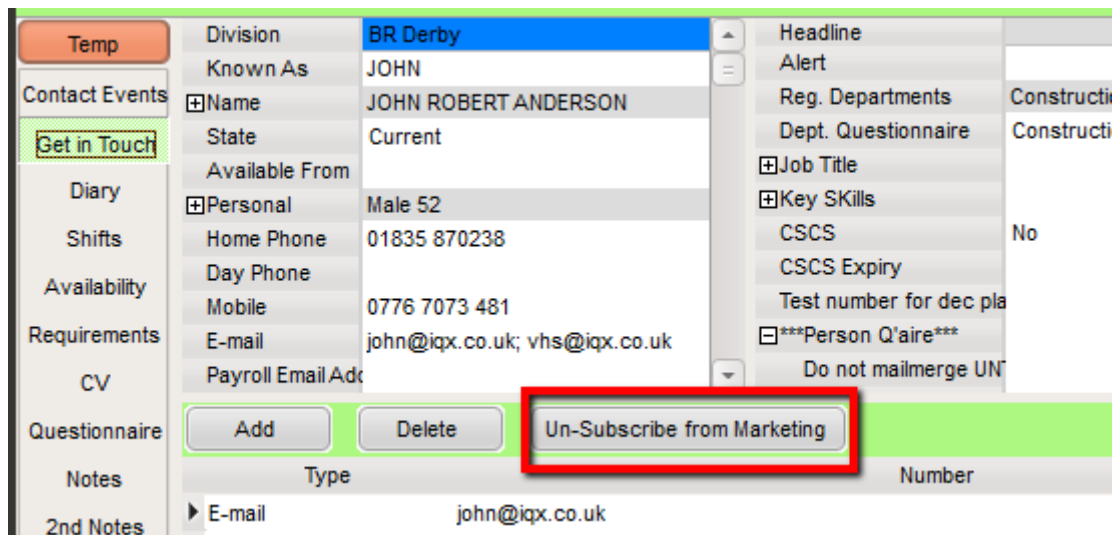
Access this feature - Help - About



## Mailmerge - Unsubscribing to Marketing

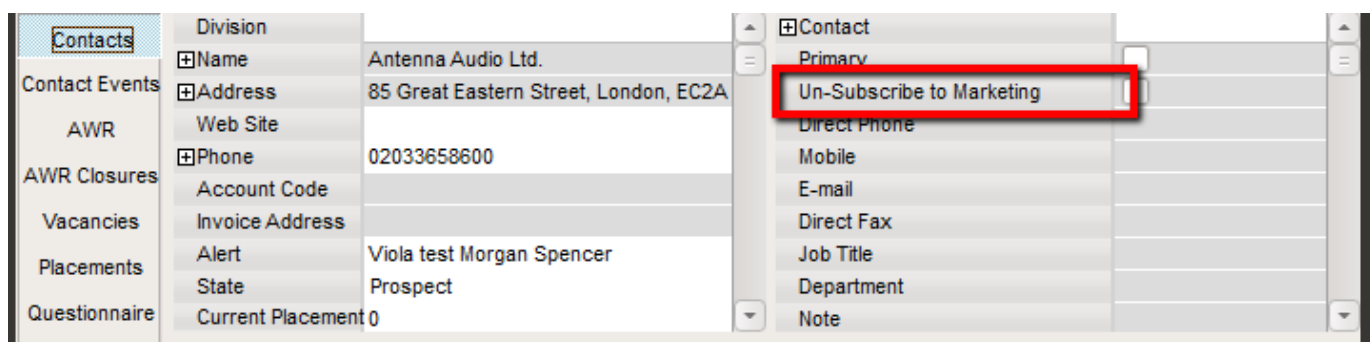
As part of the mailmerge process it is now possible to unsubscribe to Marketing on Person and Company Contacts.

To access this feature from a candidate - People - search and select a person - Get in touch (side bar)  
- Click the Un-Subscribe to Marketing button.



Temp	Division	BR Derby	Headline	
Contact Events	Known As	JOHN	Alert	
Get in Touch	Name	JOHN ROBERT ANDERSON	Reg. Departments	Constructi
Diary	State	Current	Dept. Questionnaire	Constructi
Shifts	Available From		Job Title	
Availability	Personal	Male 52	Key Skills	
Requirements	Home Phone	01835 870238	CSCS	No
CV	Day Phone		CSCS Expiry	
Questionnaire	Mobile	0776 7073 481	Test number for dec pla	
Notes	E-mail	john@iqx.co.uk; vhs@iqx.co.uk	***Person Q'aire***	
2nd Notes	Payroll Email Ad		Do not mailmerge UN	
	Add	Delete	Un-Subscribe from Marketing	
	Type		Number	
	E-mail	john@iqx.co.uk		

To access this feature from a Company Contact - Company - search and select a person or company -  
Click the Un-Subscribe to Marketing box.

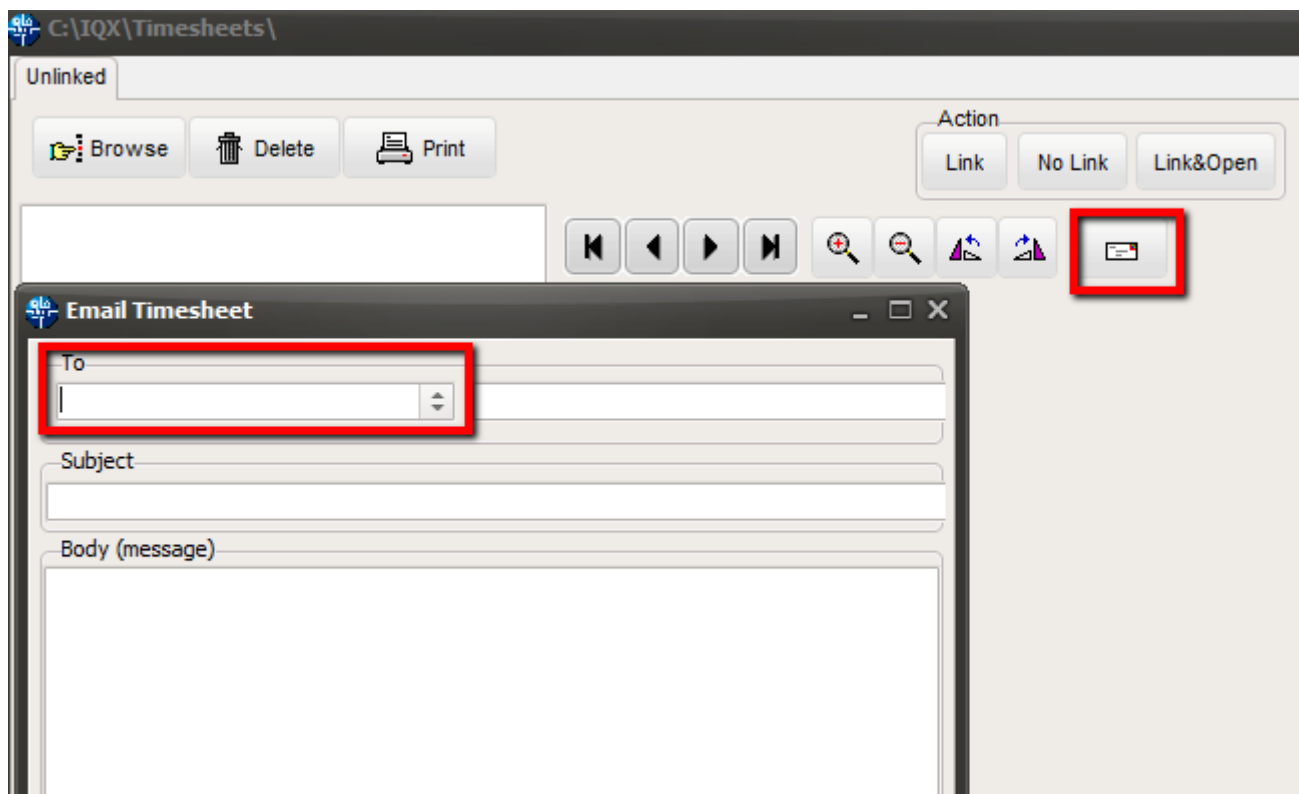


Contacts	Division		Contact	
Contact Events	Name	Antenna Audio Ltd.	Primary	
AWR	Address	85 Great Eastern Street, London, EC2A	Un-Subscribe to Marketing	
AWR Closures	Web Site		Direct Phone	
Vacancies	Phone	02033658600	Mobile	
Placements	Account Code		E-mail	
Questionnaire	Invoice Address		Direct Fax	
	Alert	Viola test Morgan Spencer	Job Title	
	State	Prospect	Department	
	Current Placement	0	Note	

## Accessing Client Email addresses in Timesheet Image Link

When emailing a Timesheet Image, Client Email addresses can be searched or typed into the email box.

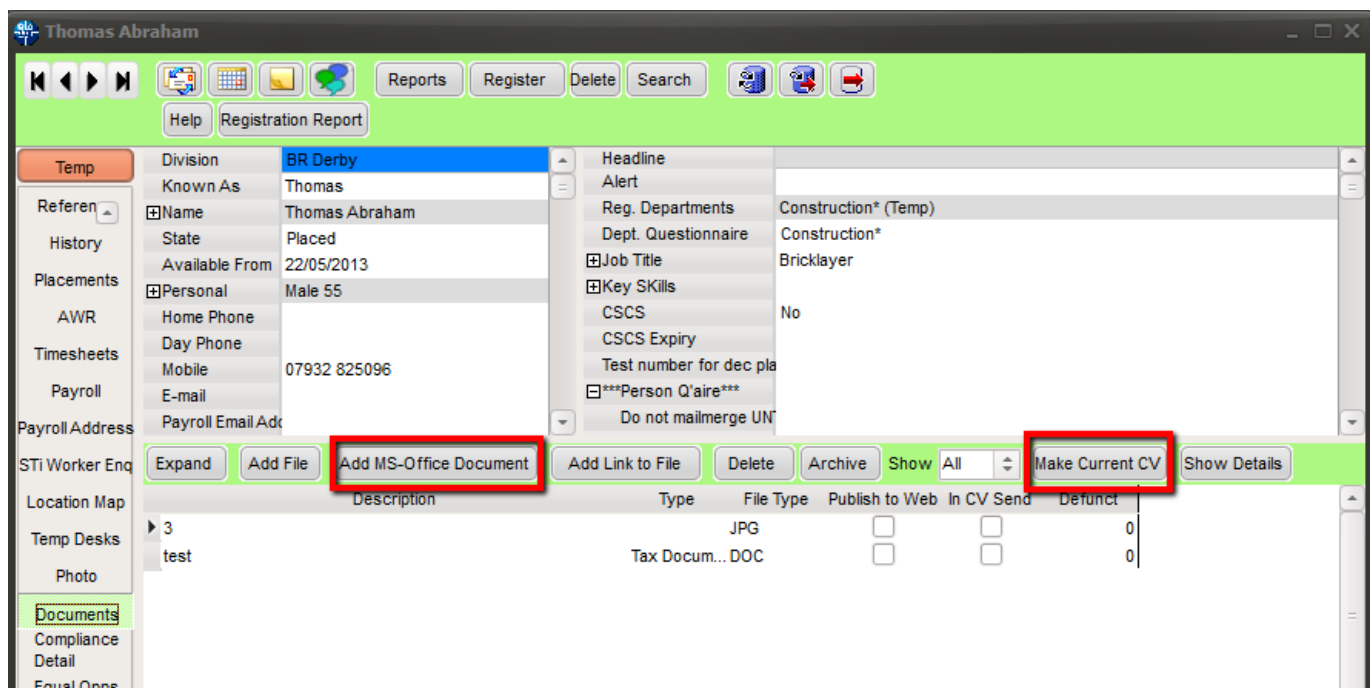
To access this feature - Accounts - Timesheet Image Link - Letter Icon - enter or search company email addresses in the To box.



## Converting MS-Office document files into Current CV

MS Office document files ending in .doc and .docx, or of type MSOffice, can now be added and converted into the Current CV within a Person record.

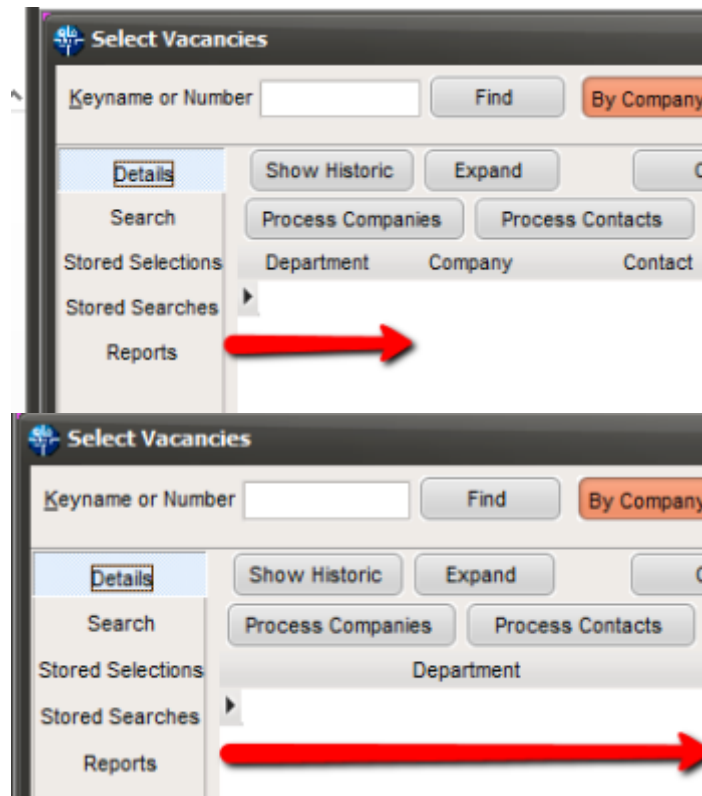
Access this feature by People - Select a person - Documents - Select or Add an MS-Office Document - Click on the Make Current CV button



## Stretchy Columns

In TempDesk, the columns are now stretchable.

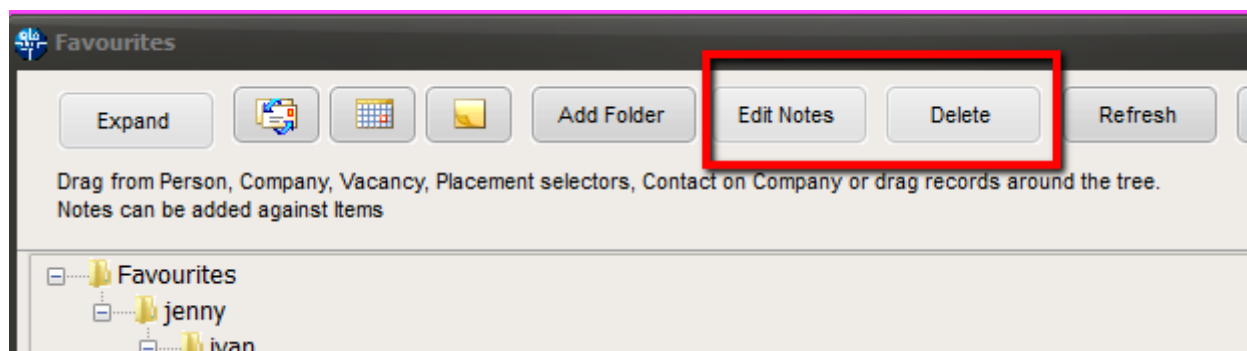
To access the feature – Temp Desk or Vacancy etc. – Find the gap between columns – Hold mouse button down and stretch!



## Editing Notes in Favourites Popup

In the Favourites popup, (the place for making personal lists of contacts/clients), it is possible to Edit Notes and Delete items from within this popup.

To access this feature – Favourites – Edit Notes or Delete

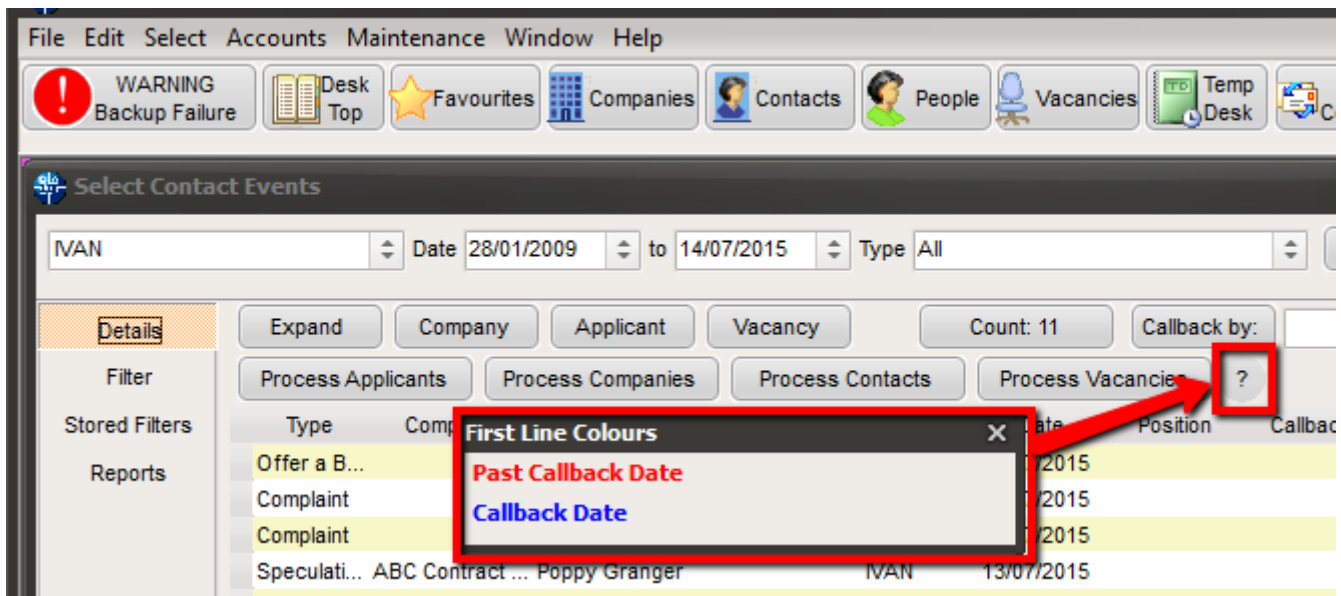




## Colour Legend included in Contact Events

A Colour Legend to explain the use of font colours has been added to Contact Event Selector, Person and Company Contact Events.

To access this feature – Contact Events Selector (not Make Contact Event) – Click ‘?’ OR People or Company – Select Company or Person – Click ‘?’



## Blocking E-Timesheets

This feature offers the option to block creation of E-Timesheets by vacancy where the client does not want timesheets filled in online.

To access this feature – Vacancies – Search and Select a vacancy - Miscellaneous – Scroll down – Block E-Timesheets





The screenshot shows the 'Miscellaneous' settings menu. The 'Block E-Timesheets' option is highlighted with a red box. The menu includes options like 'Duplicate', 'Make Permanent', 'Change Company', and 'Cascade Now'. The 'Block E-Timesheets' option is currently unchecked.

This Feature requires setting up by a System Administrator at Maintenance - General Settings - Group 'Temps' - Y against No 330 - Click the Save and Close button.

## Accounts

### Sorting by Charge Amount and Contract

Invoice Temporary Timesheets can now be sorted by Charge Amount and Contract Ref to allow all credit notes to be seen together.

Access to this feature - Accounts - Invoice Temp Timesheets

The screenshot shows the 'Invoice Temp Timesheets' interface. The 'Contract Ref Charge' column is highlighted with a red box. The table displays various timesheet entries with columns for Period, Timesheet, Account Code, Client, Payroll No., Temp, Position, PO Number, Contract Ref, Charge, and Select Attn. of.

Period	Timesheet	Account Code	Client	Payroll No.	Temp	Position	PO Number	Contract Ref	Charge	Select Attn. of
201124	2516	ABBA01	ABBA Ltd	NEW	Maria Almeida	test			180.0	<input type="checkbox"/> Accounts C
201124	V2536	AWRLINKED	AWR LK2 Applies	NEW	Sally Jones	PA			135.00	<input type="checkbox"/> Accounts C

## System Administrator

### Optimising Shift Matching Speed

The underlying code has been altered to optimise the time taken to carry out Shift Matching.

### Timesheet Image Link

A user without Accounts rights can be set up to use "Link Timesheet Images" providing the facility to



link timesheets to image files.

Access this feature – Accounts – Timesheet Image Link.

Group	Role	Search Criteria Group Assigned	Expires	Notes
TEMP	Can over-ride Temp Pay Rates	<input checked="" type="checkbox"/>		
TEMP	Can over-ride Temp Charge Ra...	<input checked="" type="checkbox"/>		
TEMP	Can add/edit lines on complete...	<input checked="" type="checkbox"/>		
TEMP	Filter shift templates allowed b...	<input checked="" type="checkbox"/>		Displays list of possi...
TEMP	Show Advanced Hydra Transf...	<input checked="" type="checkbox"/>		Only applies to Hydr...
TEMP	Can Edit Emp Contract & Exp B...	<input checked="" type="checkbox"/>		Only applies to the o...
TEMP	Can Enter Holiday Pay Timeshe...	<input checked="" type="checkbox"/>		Must not have Hide ...
TEMP	Not Current Temps	<input checked="" type="checkbox"/>		If on the Person Sele...
TEMP	Can process person based Ti...	<input checked="" type="checkbox"/>		Requires Person-ba...
TEMP	Can link Timesheet Images	<input type="checkbox"/>		Does not allow times...

System Administrator configuration required – Maintenance – Users – Select a User – Expand – Role Group ‘TEMP’

## Search Hints

Some newer users had forgotten or been unaware of the different search criteria shown in the search screen. Therefore the hints function has been set on. The text can be permanently hidden through User Layout Settings.

To switch off this feature - Maintenance – Users – Select Users – layout settings – Search on ‘hints’ – Click the Hide Search Criteria Hints button.

Group	Setting	Expires	Notes
USER	Hide Search Criteria Hints		If false displays hints d



## Adding more personalisation to Boiler Plate Text

This feature allows SMS and Emails to be personalised using Boiler Plate Text. For example a Salutation can be added to Shift Details texted to a candidate. See below for an example. However, the number of characters is still limited to 160 so this must be considered when creating Boiler Plate Text.

To configure this feature – Maintenance – Agency Setup – Boiler Plate Text – New Boiler Plate Text can be added here. Users can access the Boiler Plate Text in the usual way.

Document Templates	Applicant 2	Reference - Verbal	10 Company:
Document Types	Company	Sample Boiler Plate Text	10 Sample Boiler Plate Text
Phone Types	Progress	Sample Boiler Plate Text	10 Sample Boiler Plate Text
Boiler Plate Text	Text Message	Available?	10 Are you available for {SHIFTDETAILS}...
E-mail Signatures	Text Message	Confirm?	12 {APP_SALUTATION} Please confirm...
Contact Event Types	Text Message	Testing Principle	100 Testing message {SHIFTDETAILS}
Contact Event Outcomes			
Sources			
Company States			

Text	Length
{APP_SALUTATION} Please confirm re {SHIFTDETAILS}? Ring 01835 340034	160

## Setting up additional questions in Applicant Questionnaire but not for display elsewhere

Questions on the applicant questionnaire that have been previously set up and identified in the -2000 group will appear at the end of the general questionnaire and no-where else, e.g. for equality questions which are for monitoring purposes but not display in the candidate details.

This feature needs to be configured by your System Administrator. Set-up – Maintenance – Questionnaire – Applicant Questionnaire – See below for an example:



**Questionnaire Maintenance**

**Applicant Questionnaire**

**Questions** Add Delete Undo  Find C

Order	Question ID	Question Description	Type	Min Step Size	Units	Required	Group	Audit	Web Publish
501	T01	Print or Email Timesheets	Single Selection			<input type="checkbox"/>	-10	<input type="checkbox"/>	<input type="checkbox"/>
502	T02	Payslip Email Address	Text			<input type="checkbox"/>	-10	<input type="checkbox"/>	<input type="checkbox"/>
503	T03	Normal Hours Worked	Single Selection			<input type="checkbox"/>	-10	<input type="checkbox"/>	<input type="checkbox"/>
504	T04	Irregular Employment Pattern	Single Selection			<input type="checkbox"/>	-10	<input type="checkbox"/>	<input type="checkbox"/>
505	T05	Starter Declaration	Single Selection			<input type="checkbox"/>	-10	<input type="checkbox"/>	<input type="checkbox"/>
130	TOE	TOE Received Date	Date			<input type="checkbox"/>	-220	<input type="checkbox"/>	<input type="checkbox"/>
420	TR1	Training Courses	Multiple Selection			<input type="checkbox"/>	-240	<input type="checkbox"/>	<input type="checkbox"/>
2	TST	Test number for dec places	Numeric	0.01		<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>
340	VE	Visa Expiry	Date			<input type="checkbox"/>	-230	<input type="checkbox"/>	<input type="checkbox"/>
330	VS	VISA Type	Single Selection			<input type="checkbox"/>	-230	<input type="checkbox"/>	<input type="checkbox"/>
*	965	ABC Equality Monitoring	Multiple Selection			<input type="checkbox"/>	-2000	<input type="checkbox"/>	<input type="checkbox"/>

**Choices** Add Delete Undo **Sub C**

## Additional Audit feature

Person - Employment Period - Start Date is now audited and will appear on the Audit Trail.

To configure the Auditing - Maintenance - Database setup - Audit Items - Search '%start%' - Click the Employment Start Date box



The screenshot shows the iqx user management interface. On the left, the 'Accounts' tab is selected in the side bar. The main area displays user details for 'Roberta Azadian' under the 'BR Derby' division. The 'Audit Trail' section at the bottom shows a table of updates:

Description	When	Login Name	Old values	New values
Employment Start Date Updated - Rober...	14/07/2015 13:01	IVAN	1999-10-13	2006-10-13
Employment End Date Updated - Rober...	14/07/2015 13:01	IVAN	2013-04-12	2011-04-12
Employment End Date Updated - Rober...	14/07/2015 12:50	IVAN	2009-04-12	2015-04-12

To Access this feature - Select a client from temp Desk or People - Accounts (side bar) - Audit Trail

The screenshot shows the 'Maintenance - Database Setup' window. The 'Dictionary of Searchable Data Items' section is active, and the 'Audit Items' table is displayed. The table has columns for 'Area', 'Item', and 'Audit'. The 'Person' area has 'Employment Start Date' and 'Placement Start Date' items, both of which are checked in the 'Audit' column.

Area	Item	Audit
Company Contact	Start Date	<input type="checkbox"/>
Person	Employment Start Date	<input checked="" type="checkbox"/>
Placement	Placement Start Date	<input checked="" type="checkbox"/>

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

Permanent link:  
[https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release\\_2.3.4](https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release_2.3.4)

Last update: 2018/01/17 16:02



