



# Release 2.3.5

**Note:** 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

### Users

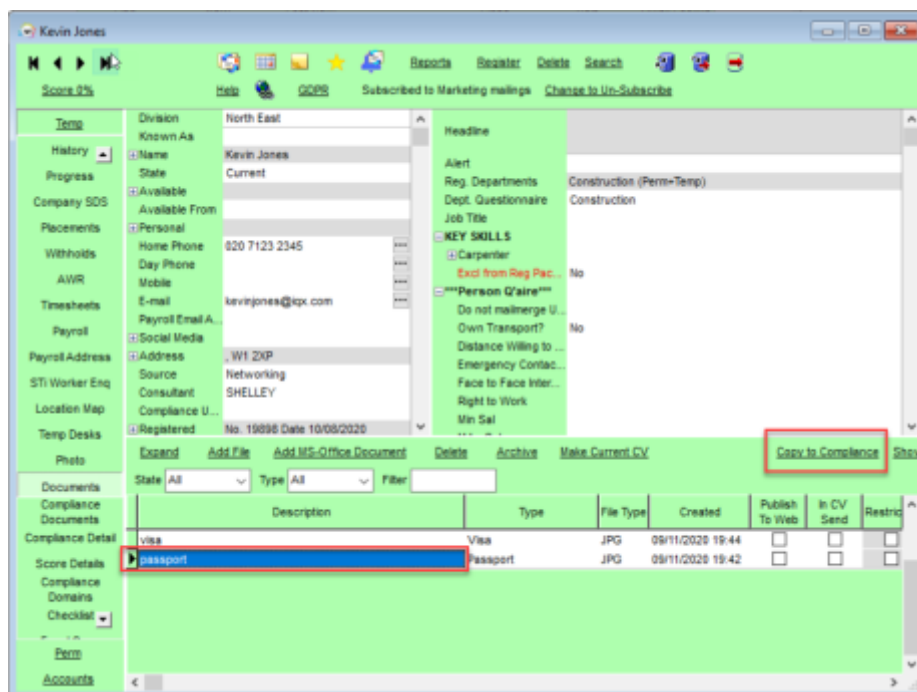
#### Separation of Compliance Docs and Docs

This feature separates out Compliance Documents by document type.

To access this feature in the Person form, scroll down the sidebar.

Compliance documents can be created in:-

Person form – Documents – Select document – Copy to Compliance OR Drag a document into Compliance Documents. Select all or part of the document – Save Compliance – Select Document Type – Complete Compliance document questionnaire.

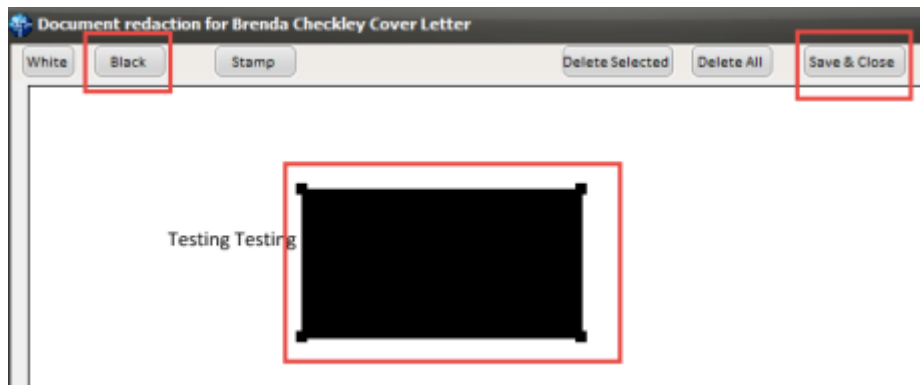


Compliance documents are saved as pdf documents. A pdf copy of the compliance document will be saved in Compliance Documents.



Documents	Expand	Redact	Archive/Unarchive	Questions	Delete	Show Archived
Compliance Documents	Description		Type	File Type	P	
Compliance Detail	Brenda Checkley Cover Letter		Cover Letter	PDF	O	

Compliance documents may be redacted. Select the document - Redact - Select the Black or White button - Click and hold down the left mouse key to drag a square over part of the document - Save and Close.



Redacted documents have a file type R in Compliance Documents.

Questionnaire	<div>ExpandRedactArchive/UnarchiveQuestionsDeleteShow ArchivedShow Archived</div>				
Notes					
2nd Notes					
Reference					
History					

Description	Type	File Type	Public
Brenda Checkley Cover Letter	Cover Letter	PDF	O
Brenda Checkley Cover Letter	Cover Letter	PDF	R

This feature may require System Administrator setup.

## Branding

It is possible to set up Automatic shift notifications that send by email, SMS message or print, a confirmation of shifts to clients and/or temps.

These are set up as templates, and functions are created to specify the use, dependent on agency requirements. It is possible to have multiple brands and styles and behaviour is specified to identify which brand, template and method of sending is to be used in which circumstance (for example in the simplest terms which template is used when sending to a temp and which is used when sending to a client).

Documents and reports can also be sent as attachments to emailed confirmations.

As it is fully configurable based on agency requirements, this is a chargeable function and set up costs are based on time. Please contact IQX Support for a quote, demo, or to discuss your



requirements.

## Enhancement to Withhold from Group to clarify which are not employments

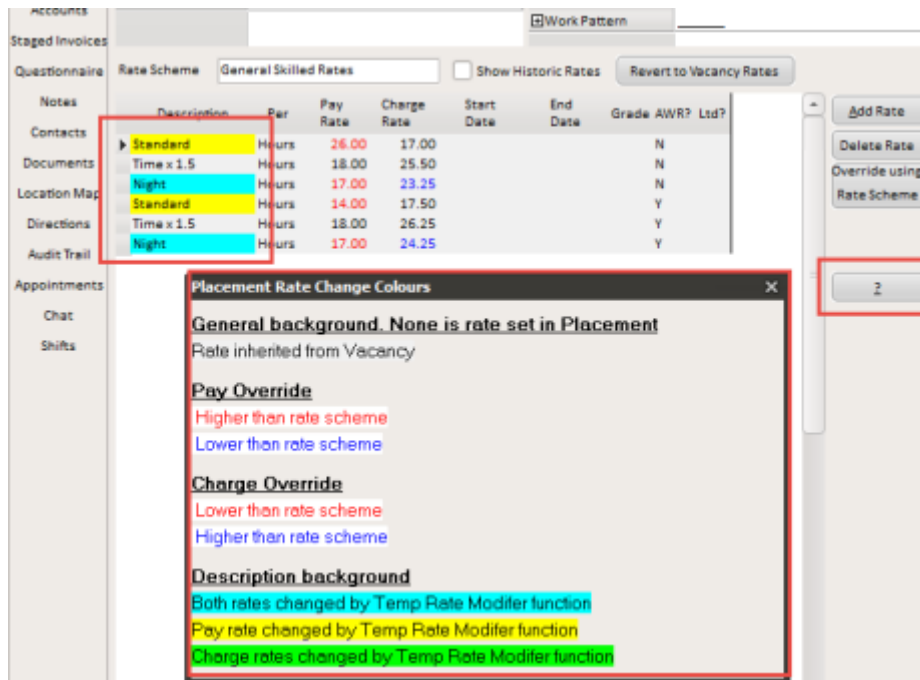
If a company is in a group and the Withhold button, on the History view, is used there is an option to Withhold from Group. If this is accepted the group companies are listed in the employment with the job title 'For Withhold from Group'.

Company	Job Title	Temp	External	From	To	Salary	Concurrent	By Us
AWR Applies TEST CHANGE	ASA Shift Test	<input checked="" type="checkbox"/>	<input type="checkbox"/>	22/11/2011	06/12/2011		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AWR LEAGGS School	Advanced Cover Supervisor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	03/12/2011	03/12/2011		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AWR Private School	Big Cover Supervisor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	24/11/2011	24/11/2011		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AWR Private School	Big Cover Supervisor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	01/12/2011	01/12/2011		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AWR Private School	Big Cover Supervisor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/12/2011	08/12/2011		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Faculty of Public Health Medic...	For Withhold from Group	<input checked="" type="checkbox"/>	<input type="checkbox"/>				<input checked="" type="checkbox"/>	<input type="checkbox"/>

## Placement Rate Colour Legend to highlight TempRate Modifier has been used

A Placement Rate Colour legend has been added to highlight when TempRate Modifier has been used.

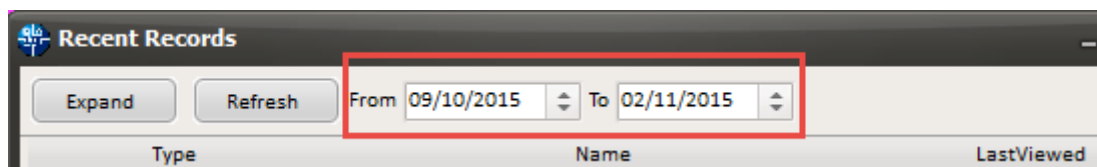
Access this feature on a Placement - Rates view - Question mark button.



## Recent Records be able to look via a date range

Recent Records have been enhanced to allow searching between a date ranges.

To access this feature Press Ctrl + F2 **or** Select - Recent Records and insert the date range under consideration.



## Insert Text and File, Division menu list size switch

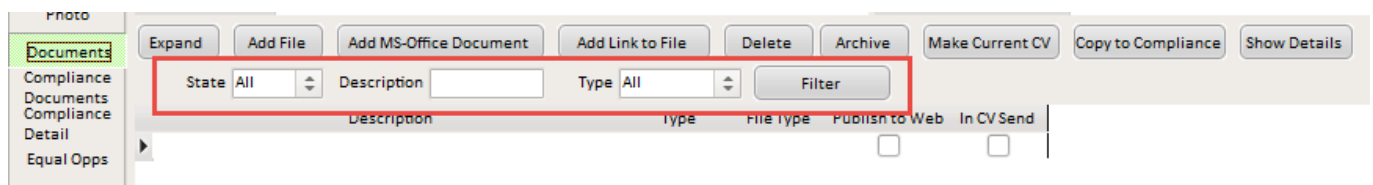
A switch has been inserted so the menus do not stretch beyond the screen, if the list grows larger than a screen depth.

This feature will require System Administrator setup.

## Documents: adding, archiving and managing

In Person, Placement, Company, Vacancy and Progress filtering has been added to the document view.

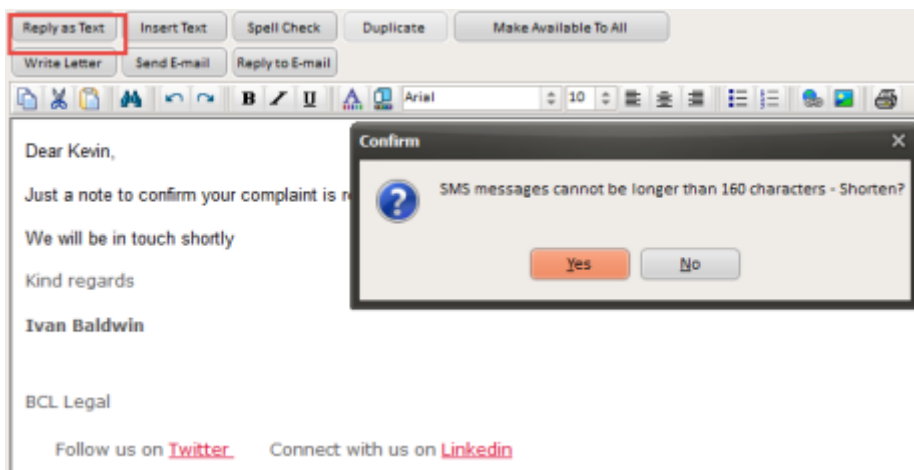
This feature allows searching and filtering of Document State and Type along with key word searching in the description.



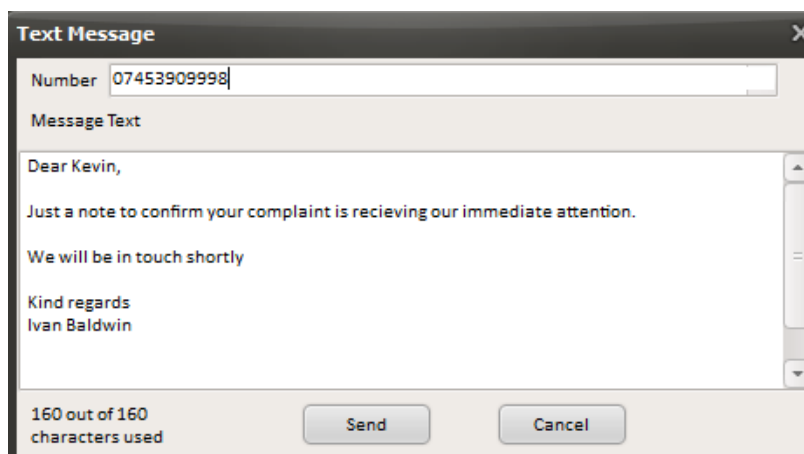
In addition, the sort order has been amended to place any archived records at the bottom of the list.

## HTML Email - Plain Text Reply Method

An option to reply to an HTML email in a plain text SMS message.



When replying to an HTML email, write or insert text and then use the Reply as Text button to send the text as plain text. The Contact Event will be saved as HTML.



## Add to Diary List Option to Multiselect and Delete

This feature enables multi-selecting and deletion in Diary List. To use this feature - Desktop - Diary List - Highlight the entries to be deleted using the mouse and the Ctrl key - Delete - Confirm.



The screenshot shows the 'Desk Top' application window. On the left is a sidebar with navigation options: 'Daily Work List', 'Diary', 'Diary List' (highlighted), 'Inbox', 'Progress due for Action', and 'Interview'. The main area displays a table of work entries. The table has columns: Date, Time, Consultant, Popup, Description, Type, Applicant, Company, Pr'ty, and Entered. The data rows show entries for 14/09/15 at 06:30 for various consultants (IVAN, DEMO, REGISTER, STEVE, STEWART, VHS) at Sacco Mann. The 'Delete' button in the top right corner is highlighted with a red box.

This feature requires System Administrator setup.

## Show Site Name on completed Timesheet

The ability to show the site name on a completed timesheet has been added.

Once there is a completed timesheet, select a timesheet, it will show in the References section.

The screenshot shows the 'Details' section of a timesheet form. The 'References' field is highlighted with a red box and contains the text 'PO Number00578 Site. test'. Other fields include Client (510 3I Group PLC), Job Title (Operator), Timesheet Number (V2068), Period (W 201532), Dates (From 02/11/2015 to 08/11/2015), Payroll Company (1), and Analysis Code (E3).

## Add Period Filter to Timesheet View - as in Vacancy Timesheet View

The facility to filter timesheets by period in Vacancy has been extended to filtering timesheets in Person. This reduces the time for the form to load.

View this feature via the Person form - Timesheets - The 'Show from Period' box defaults to showing the last 10 weeks. To see more enter the starting week and Apply. Display will change to show only those timesheets from that period.



Kevin Constance

Temp

Placeme

AWR

Timesheets

Payroll

Payroll Address

STi Worker Enq

Location Map

CIS (2007)

CIS Cards

Temp Desks

Division: BR Derby

Known As: Kevin

Name: Kevin Constance

State: Current

Available From:

Personal: Male 27

Home Phone: 01835 9013472

Day Phone:

Mobile: 07453900090

E-mail:

Payroll Email Ad:

Social Media:

Headline:

Alert:

Reg. Departments: Construction\* (Temp), Industrial (Perm+Temp)

Dept. Questionnaire: Construction\*

Job Title:

Key Skills:

CSCS:

CSCS Expiry:

Test number for dec plac:

\*\*\*Person Q'aire\*\*\*

Do not mailmerge UN:

Location Zone: Any Area

Expand Add Self-Book Holiday Pay Query Create Show from Period: 201523 Apply

Period Number Company Position Gross Pay Net Charge

This functionality requires System Administrator setup.

## IQXWeb

### Visibility of a Person Record being registered as an IQXWeb User

This feature identifies Candidates and Contacts who are enabled to use IQXWeb.

View this feature by selecting a Person or Contact and finding the IQXWeb icon. A red tick indicates the Person or Contact is an active IQXWeb user.



## System Administrator

### Audit Trail side bar button location moved to bottom of list in the Person form

In Person records the Audit Trail side bar button has been moved to the bottom of the list.

Visibility of this button can be set up via Maintenance - Users - Roles - Role Group SUPERUSER - Can see Audit Views without Tech Support Role



Group	Role	Search Criteria Group	Assigned
SUPERUSER	Can edit the Division field of a Person or Compa...		<input checked="" type="checkbox"/>
SUPERUSER	Can drag-merge Company or Person records		<input checked="" type="checkbox"/>
SUPERUSER	Can move Contact without Maintenance Role		<input checked="" type="checkbox"/>
SUPERUSER	Can use Document Templates from all branches		<input checked="" type="checkbox"/>
SUPERUSER	Can make Contact Events available to all users		<input checked="" type="checkbox"/>
SUPERUSER	Can see Audit Views without Tech Support Role		<input checked="" type="checkbox"/>

**and** Maintenance – Users - Layout Settings - Role Group – General - Can edit own screen layout.

Group	Setting	Activated	Expires	Notes
GENERAL	Can edit own screen layout	<input checked="" type="checkbox"/>		Allows user to hide s...
USER	Hide All Appointments view	<input type="checkbox"/>		Applies to Person, Co...
USER	Hide All Holiday Pay Buttons	<input type="checkbox"/>		To enter timesheets r...

This feature can be viewed via the Person form – Scroll down the side bar to the bottom of the list.

## Add Period Filter to Timesheet View - as in Vacancy Timesheet View

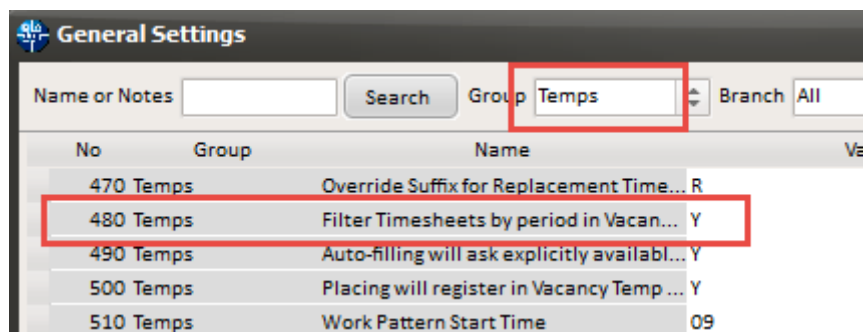
The facility to filter timesheets by period in Vacancy has been extended to filtering timesheets in Person. This reduces the time for the form to load.

View this feature via the Person form - Timesheets – The 'Show from Period' box defaults to showing the last 10 weeks. To see more enter the starting week and Apply. Display will change to show only those timesheets from that period.

To set this up:- Maintenance – General Settings – Group Temps – No 480 = Y – Save and Close. This



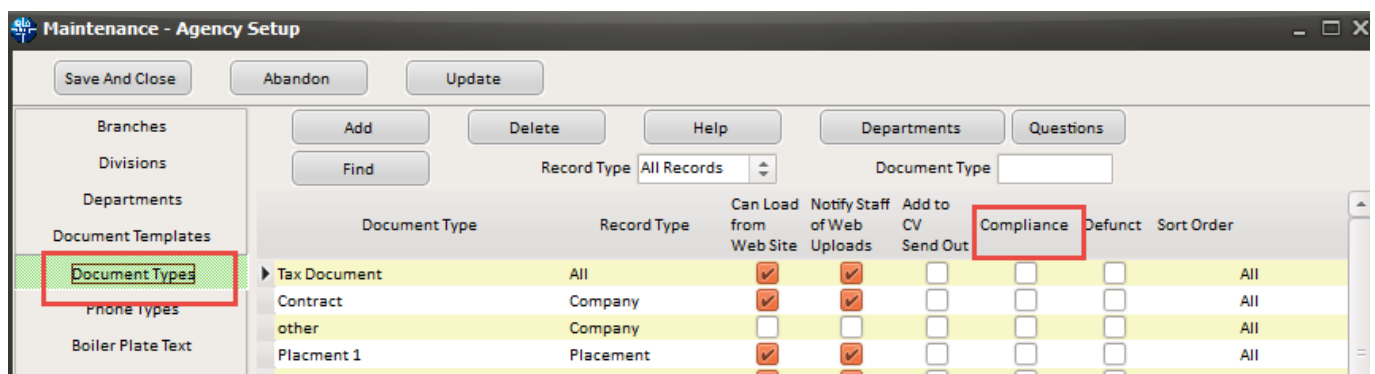
feature uses the same switch as vacancy timesheet.



## Separation of Compliance Docs and Docs

This feature separates out Compliance Documents by document type.

To set a document type as compliance you need to tick the Compliance checkbox in Maintenance - Agency Setup - Document Types



By default it will be associated with all departments but a selection can be made available using the Department button. In addition, questions can be associated with a compliance document by using the Questions button. When a compliance document is added the questions will be displayed.

To access this feature in the Person form, scroll down the sidebar.

To setup compliance views:- Maintenance - Users - Role - General - Can maintain Clearance/Compliance



Name	Keyname	Login Name	Job Title	E-Mail Address	Short ID	Template for New Users	Not In Use	Branch	Division	Default Department	Default Tempdesk	Analysis Code	Nominal Segment (main	Report View Level	Report Print Level	Report Export Level
Ivan Baldwin	BALDWIN IVAN	IVAN		ivan@iqx.co.uk	PI	<input type="checkbox"/>	<input type="checkbox"/>	Nottingham	123456789012	Drivers	Demo - Constr			2000	2000	2000

Group	Role	Search Criteria	Group Assigned	Expires
GENERAL	Permanent Consultant		<input checked="" type="checkbox"/>	
GENERAL	Temp Consultant		<input checked="" type="checkbox"/>	
GENERAL	Accounts Clerk		<input checked="" type="checkbox"/>	
GENERAL	Can maintain Clearance/Compliance		<input checked="" type="checkbox"/>	
GENERAL	Can maintain Social Care		<input checked="" type="checkbox"/>	

and Maintenance - General Settings - Settings - No. 1810 = N

No	Group	Name	Value	Notes
1800	Settings	Show Rate Filter 3 Description	N	
1810	Settings	Hide Document Pack Sending System	N	Other Settings are needed General 85 and 86, Email/T
1820	Settings	URL Base for DAXTRA linked Systems		Format - http://www.iqx.co.uk/ (do not include DAXTRA
1830	Settings	Message blocking old IQX connecting		
1850	Settings	Boiler Plate Menu Break	15	If value > 20 then split menu into sections. The length

## Branding

It is possible to set up Automatic shift notifications that send by email, SMS message or print, a confirmation of shifts to clients and/or temps.

These are set up as templates, and functions are created to specify the use, dependent on agency requirements. It is possible to have multiple brands and styles and behaviour is specified to identify which brand, template and method of sending is to be used in which circumstance (for example in the simplest terms which template is used when sending to a temp and which is used when sending to a client).

Documents and reports can also be sent as attachments to emailed confirmations.

As it is fully configurable based on agency requirements, this is a chargeable function and set up costs are based on time. Please contact IQX Support for a quote, demo, or to discuss your requirements.



## Maintenance - General Settings Form - Search moved to the left

In Maintenance - General Settings. Search has been moved to the left of the form to provide an initial search focus and a description box has been added.

The screenshot shows the 'General Settings' window. A red box highlights the search area on the left, which includes a text input field labeled 'Name or Notes', a 'Search' button, and a 'Get' button. To the right of the search area are dropdown menus for 'Group' and 'Branch', both currently set to 'All'. Below these controls is a table with the following data:

No	Group	Name	Value
10	Settings	Local IQX Configuration cache	N
17	Settings	Job Title in Contact Address	Y
18	Settings	Department in Contact Address	N
20	Settings	Contact Event Outcomes are Non-Edi...	
30	Settings	Remove Spaces from Keynames	N
40	Settings	Applicant Number on Selector Grid	N
50	Settings	Show Diary Availability by Default	N
60	Settings	Diary Cell Size in Minutes	30

## Convert Boiler Plate Text

There is an extension to the webservice CONVERT\_BOILERPLATETEXT with new parameters added.

The existing parameters were ID1, ID2, html & Text. Type, ID1 & ID2 can still be used (left in for any job using them) but new parameters have been added:-

person, vacancy, placement, progress, company, employment, shifts, brand, consultant, contactevent (not with ID1 & IQ2 or type) e.g. <StaticFunction service="CONVERT\_BOILERPLATETEXT" person="{bpt\_personid}" html="No" text="{BPTText}"/>

**Note** in all of these examples the text parameter MUST come last.

## Menu list size switch

A switch has been created to force File, Divisions and Insert Text - Boiler plate menus so they do not stretch beyond the screen.

This function is enabled via Maintenance - General Settings - Group - Settings - No 1850 and inserting the number of items required before an additional column is started. Note if the value inserted is below or equal to 20 this function will keep the list as a single column.



General Settings

Name or Notes

Search

Group Settings

Branch All

Get Colour

Save and Close

Abandon

Update

Help

No	Group	Name	Value	Notes
1830	Settings	Message blocking old IOX connecting		
1850	Settings	Boiler Plate Menu Break	15	If value > 20 then split menu into sections. The length of each section will be the value.
1860	Settings	Scan Timesheet Division Link	N	If Y (YES). Default the division to 'All' on scan timesheet link
1870	Settings	Resolution for Compliance Documen...	72	Allows fine tuning of readability/size
1880	Settings	Compression for Compliance Docum...	75	Allows fine tuning of readability/size

## Ability to Block Extra States of Clients

A new switch has been added to allow the blocking of certain Client States from the pick lists when adding a new vacancy.

Then access - Maintenance - General Settings - Switchable Fields - No 2800 and insert the Company states that will be blocked.

General Settings

Name or Notes

Search

Group

Switchable Fields

Branch

All

Get Colour

Save and Close

Abandon

Update

Help

No	Group	Name	Value	Notes
2760	Switchable Fields	Placement Selector Switchable Field ...		
2770	Switchable Fields	Placement Selector Switchable Field ...		
2780	Switchable Fields	Placement Selector Switchable Field ...		
2800	Switchable Fields	States to exclude from new temp vac...	C	List of client states, no separators, to be excluded when selecting new temp vacancy
2850	Switchable Fields	Delete in bulk on Diary List	Y	

The Company State codes are in Maintenance - Agency Setup - Company States.

Maintenance - Agency Setup				
Save And Close		Abandon	Update	
Boiler Plate Text		Add	Delete	
E-mail Signatures				
Contact Event Types				
Contact Event Outcomes				
Sources				
Company States				
Person States				
State	Name	Order	Grid Order	
P	Prospect	10	10	P
C	Client	20	20	C
I	Invoice Address	25	25	I
S	Supplier	30	30	S
A	Secondary Agency	35	35	S
	Archived	40	40	C

## Changes to Jobrunner Commands <Set Variable> and <If>

In Jobrunner <SetVariable> will now allow regular expression substitutions and <If> will do regular expression matches.

Refer to <SetVariable> and <If>



## Add to Diary List Option to Multiselect and Delete

This feature enables multi-selecting and deletion in Diary List. To use this feature - Desktop - Diary List - Highlight the entries to be deleted using the mouse and the Ctrl key - Delete - Confirm.

To enable this feature will require the ability to delete major records - Maintenance - Users - Roles - General - Can Delete Major Records - Tick.

Group	Role	Search Criteria Group	Assigned
GENERAL	Can edit their own records		<input checked="" type="checkbox"/>
GENERAL	Can edit the Consultant field of		<input checked="" type="checkbox"/>
GENERAL	Can delete major records		<input checked="" type="checkbox"/>
GENERAL	Manager		<input checked="" type="checkbox"/>
GENERAL	Can view embedded web pages		<input checked="" type="checkbox"/>
GENERAL	Can access Hydra web site		<input checked="" type="checkbox"/>

Along with the setting to delete in bulk on Diary List. - Maintenance - General Settings - Group - Switchable Fields - 2850 - Delete in Bulk on Diary List = Y.

No	Group	Name	Delete in Bulk on Diary List
2800	Switchable Fields	States to exclude from new temp vac... C	
2850	Switchable Fields	Delete in bulk on Diary List	Y

If All Users are selected but the User has been restricted from deleting other users reminders the Delete button will not show.



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