

Release 2.16.4

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

Alternative top right view on vacancy

Switchable Extra Notes can now be added to the Vacancy top right view so that users have 2 notes fields.

In the Vacancy form the button Switch Job Desc takes you to the Job Description view and Switch Extra Notes takes you to the Extra Notes view.



This can be set up by your System Administrator.

Export XLS files (jobrunner) with Landscape Orientation

Data exported to an Excel spreadsheet, whilst using JobRunner, can be set to display the information in Landscape format. This is particularly useful for jobs where an Excel spreadsheet is sent to the Candidate to print out timesheets. An extra piece of code needs to be added to an xml job.

Contact IQX to have this facility included in your Xml jobs. This may be chargeable.

Shift confirmation email/sms - (without Branding)

When sending shift confirmations by email and SMS it is now possible to use other boiler plate text (BPT) in addition to {SHIFTDETAILS} e.g. {VAC_POSITION} {VAC_SITENAME}.

Contact your System Administrator to add additional BPT.



User switch to block editing rates on Vacancy

Where a user is allowed to either maintain schemes or override pay or charge rates is now possible to block changes to the vacancy rates. This feature becomes active once a placement is made against the vacancy.

This feature will need System Administrator set up.

Make Registration Number Read only

It is now possible to make Person record registration numbers read only.

In the Person record the registration number will be displayed in grey.

Consultant	VHS	
ERegistered	No. 10039	
Number	10039	
Date		
Last Updated	23/10/2015 14:04	

This requires System Administrator set up.

Person payroll validation checks on Pay Freq/Method & Tax Method

New candidates without Tax Method, Payment Method or Pay Frequency will default to PAYE/BACS and Weekly on completion of their first timesheet.

	Applicant	,	
	Payroll No.		
	Pay Method	BACS	-
	Tax Method	PAYE	-
	Pay Freq.	Weekly	-
ľ	Date of Birth	03/06/1986	-
	NI Number		

Once a candidate has been issued with a payroll number validation checks will be carried out on the Person record to ensure that they have these fields completed and the Person record cannot be saved without these fields completed.





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E-mail Payroll Ema		×
ESocial Media Address Source	Tax Metho	d not Entered, required when Payroll Number exists
Consultant ERegistered Last Update		ок
Holiday Pay	P45/Leave	Composite Co Template Maintenance
	1 ib/ccave	Composite do rempilate rialiterialite
Payroll Number	010101	
Payroll Number		
Payroll Number Start Date		
Payroll Number Start Date ⊡Bank Details		
Payroll Number Start Date ⊞Bank Details Email Payslips	010101	
Payroll Number Start Date ⊞Bank Details Email Payslips Pay Method	010101	
Payroll Number Start Date ⊞Bank Details Email Payslips Pay Method Text Payment Advi	010101	

Company contact view changes

In the company contact view it is now possible to show Temps by default.

It is possible to temporarily switch this view off using the **Include Temps** button.

Questionnaire	Source			_			-
Contact	Select Add Co	ontact Tree	Person	Leave Include F	ormer Include 1	Temps Include Placed	
Questionnaire NotesV	Name	Status	Primary	Job Title	Note	Department S	Start Date 🔺
Notesv	Ivan Baldwin						9/02/2015
Extra Notes	John Arthur Smith	Client/Can		Branch Manager			

Font and background colours are assigned to different person states the colours will be visible in the company contact view.

Some System Administrator set up is required.

Accounts

Person payroll validation checks on Pay Freq/Method & Tax Method

New candidates without Tax Method, Payment Method or Pay Frequency will default to PAYE/BACS and Weekly on completion of their first timesheet.

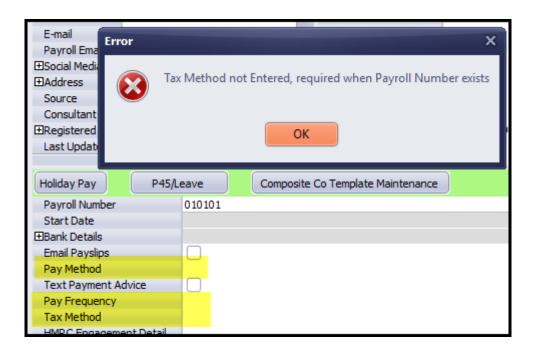
2024/05/25 15:51

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4	Applicant								
Pa	ayroll No.								
Pa	ay Method	BACS	-						
Ta	ax Method	PAYE	-						
Pa	ay Freq.	Weekly	-						
Di	ate of Birth	03/06/1986	-						
N	I Number								

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Once a candidate has been issued with a payroll number validation checks will be carried out on the Person record to ensure that they have these fields completed and the Person record cannot be saved without these fields completed.



User switch to block editing rates on Vacancy

Where a user is allowed to either maintain schemes or override pay or charge rates is now possible to block changes to the vacancy rates. This feature becomes be active once a placement is made against the vacancy.

This feature will need System Administrator set up.

Standardise Accord payslip viewing, add date filter

A date filter has been added to the Accord payslip view.

System Administrator



Alternative top right view on vacancy

Switchable Extra Notes can now be added to the Vacancy top right view so that users have 2 notes fields.

This is set up in - Maintenance - User Roles - Can edit Vacancy Extra Notes.

Role Group Al	*	vacancy	Search		
Group	Role	Search Criteria Group	Assigned	Expires	Notes
GENERAL	Can edit Vacancy Extra Notes				At least 1 department must have Show Extra Notes on.

Departments need to be set up to show extra notes via Maintenance - Agency Setup - Departments

Branches	Add Delete	Help			
Divisions	Applicant Questionnaire	Vacancy Questionnaire	Placement Questionnaire	Reference Questionnaire	e Timesł
Departments	ID Department	Searchable Division	Analysis Code	Publish To Web Sort Order	Show
Document Templates	▶0 Null		,,		Extra Notes
Document Types	DR Drivers			Ö	
Phone Types	HE Health				

The Extra Notes title can be amended in Maintenance - General Settings - Terminology - No 760.

770 Terminology	Collection Child 2 Name	SUD-SUD-Collection
780 Terminology	Vacancy Extra Notes	Extra Notes

Audit changes to department registration

Changes to Department registration can now be audited.

In Maintenance – Database Setup – Audit Items – Area – Person – Item = Department Registration:

🏶 Maintenance - Database Set	up			_ 🗆 X
Save And Close Aban	idon Update			
Dictionary of Searchable Data Items	Area Person	Search		
Custom Word Merge Fields	Area	ltem	Audit	·
Audit Items	Person	AWR Exemption Reason		
	Person	Department Registration		
Index Server	Person	Payroll Company		
License	Person	Payroll Number		
Job Runner Schedule Group	Person	National Insurance Number		

Any changes to department registration will appear in Maintenance - Database Diagnostics - Audit Trail - AUDIT

					iqx					
2024/05/25 15	5:51				6/8				F	Release 2.16.4
Database				-	Refresh	Close			-	
Database Details Engine Details	Audit Type AUD	DIT	➡ Date 28/03/20 Description	16 👻	to 15/04/2016 When	C C Login Nar	Count me Old Valu	Export / Archive		Connection ID
Lingine Details	AUDIT	Audit Updated ·	Person Department Regi	stration	13/04/2016 10:28	IVAN	0	1	XXMANSB	1

Export XLS files (jobrunner) with Landscape Orientation

Data exported to an Excel spreadsheet, whilst using JobRunner, can be set to display the information in Landscape format. This is particularly useful for jobs where an Excel spreadsheet is sent to the Candidate to print out timesheets. The code used to facilitate this is (in bold)

<ExportFile filename="{TempDir}Timesheet.xls" excelfontname="Arial" excelfontsize="9" breakpoint="no" excelorientation="landscape">

If the orientation isn't set xls defaults to portrait.

Contact IQX to have this facility included in your Xml jobs. This may be chargeable.

Shift confirmation email/sms - (without Branding)

When sending shift confirmations by email and SMS it is now possible to use other boiler plate text in addition to {SHIFTDETAILS} e.g. {VC_POSITION} {VAC_SITENAME}.

User switch to block editing rates on Vacancy

Where a user is allowed to either maintain schemes or override pay or charge rates is now possible to block changes to the vacancy rates using a switch in Maintenance - General Settings - Temps - 1010.

1000 Temps	Show Shift (Our Ref) button on Main	N
1010 Temps	Block editing Rates on Vacancy	Y

This feature becomes be active once a placement is made against the vacancy.

New Database Functions - GenerateWebDialURL() and CustomSMSHTTPRequest()

New functions have been added to Maintenance - Database Functions - Communications inc. Email.



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Headlines Invoice Functions Pre-Validation Functions Validation Functions Validation Functions State Change Functions AWR Custom Column Settings Compliance IQX Hub Temp Rate and Grade Functions		
Communications inc. Email	Generate Web Dial URL Custom SMS HTTP Request	
Temp Shift Editing Allowed Temp Shift Confirmation Change Payroll Code for Accord Temp Timesheet Complete	File Name for E-mailed CV Templates for Company Contracts Templates for Applicant Contracts Email Body for Statement File Name for E-mailed Letter as Attachment	
Vacancy Role Filter Person Departmental Alert	Vacancy Details Sending Contents	

Please contact IQX to have these functions modified. This may be a chargeable activity.

Make Registration Number Read only

It is now possible to make Person record registration numbers read only.

In General Settings - Settings - No. 1980 - Make Registration Number Read only - Y will make registration number read only.

1970 Settings	Vacancy Rates Holiday Pay Descrip	
1980 Settings	Make Registration Number Readonly	Y

In the Person record the registration number will be displayed in grey.

Image: Provide state state No. 10039 Number 10039 Date	
Date	
Date	-
Last Updated 23/10/2015 14:04	=

Company contact view changes

In the company contact view it is now possible to show temps by default in Maintenance - General Settings - Settings - No 1251 - Y.

		iqx	
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1251 Settings	Inc Temp Applicants in Contact List	,	Controls whether Temp candidates appear by default in the Company Contacts list

In addition font and background colours assigned to different person states will now be visible in the company contact view. These are set up in Maintenance - Agency Setup - Person States.

👫 Maintenance - Agency	Se	tup										
Save And Close	A	bando	n Upda	ate								
Branches			Add	Delete		Unused Codes		Background Co	plour	Font Colour		_
Divisions		Code	Name	Order G	id rder	Note		Publish To Web	Set On Web	Background Colour	Font Colour	0 Fr
Departments	I	с	Current	1	10	urrently looking fo	r w	. 🗆		33023	652	280
Document Templates		P	Placed	2		laced				16777215		0
Document Types		L	Client	3	3 C	lient				16777215		0
		R	Pre registration	4	4 A	dded - not enough	d	. 🗆		15588575		-1
Phone Types		D	Not Active	6	6 D	eleted				16777215		0
Boiler Plate Text		Α	Secondary Agency	10	10 S	econdary Agency	Temp	p 🗌		16777215		0
E-mail Signatures		N	Client/Candidate	11	11 lj	kh				16777215		0
-		Z	Umbrella	20	20 U	Imbrella improt test	s			16777215		0
Contact Event Types			Archived/DNU	99	99 D	eleted				16777215		0
Contact Event Outcomes												
Sources												
Company States												
Person States												
Managary Chahaa												

It is possible to temporarily switch this view off using the **Include Temps** button.

Questionnaire Contact Questionnaire NotesV Extra Notes	Source								
	Select Add C	Contact Tree	Person	Leave	Include Former	Include Temps	Include Placed	1	
	Name	Status	Status Primary		ïtle	Note	Department	Start Date	-
	Ivan Baldwin		Current						
	John Arthur Smith	Client/Can		Branch Ma	nager				



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