

Release 2.17.10

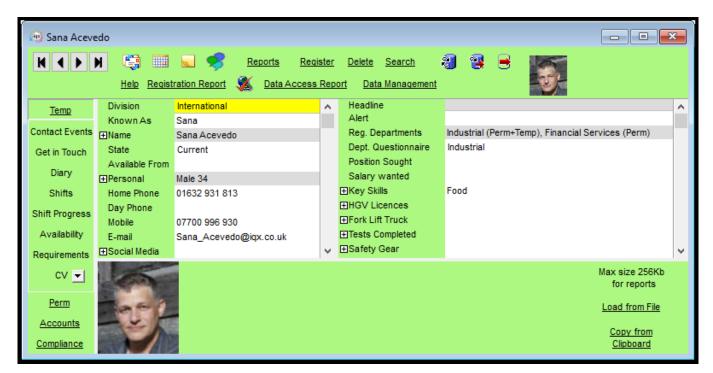
If you have custom forms defined in IQX, not all new features may be available to you. Your agency custom forms are shown on Help – About.

- User
- System Administrator
- Enhancements
- Fixes

User

Thumbnail photo on the button bar of the Person form

A thumbnail of the photo stored in Person – Photo can now be displayed on the top right hand of the Person form for ease of viewing when videoing through candidate records.



New Column on Expiry Dates View - Shifts After Expiry

A new column has been added to the expiry dates view called 'Shifts after Expiry'. This column shows the number of shifts booked after the first expiry date. This has been designed to assist with booking future shifts before a candidate has been re-cleared on the expectation that the clearance will happen in time.

					19	X					
2024/05/26 0	06:56					2/8					Release 2.17.10
🚇 Temp Desk	:										
Desk Demo - Constru	View uction ABC View	Year Wee Shift ∨ 2017 ← 25		24/09/	2017	to Current ke Current	Process	<u>Update</u>	<u>Close</u>	<u>Help</u>	
AWR Ter	Search Expand	O Current Pool Temps to Entire Pool Show:	 All Expire 		O € Expiring O €	Expiring Expired Only	Clear Column F	ilter State	All 🗸	Working this week	
AWR Checking TS Query Log Expiry Dates	Name	alert		Shifts after Expiry	CSCS Expiry Lead 30	Kit Nos Date Ex Lead 30	DBS Expiry Lead 60	Visa Expiry Lead 60			^
	Frankie Kidd		-35	11	19/09/2017						~

Pop Up Reminders adding other staff

In addition to adding staff when creating a reminder, it is now possible to add or remove staff at the point when the reminder pops up.

🛞 Appointme	ent / Reminder
Popup Aqain	5 🚖 Copy Delete 🍓 😫 🖶
At	~
Consultant	NAN V Priority level 5
	Popup Notification 0 🚖 Minutes 🗸 Beforehand
Date / Time	Thu 26/10/2017 11:59 V Recur every 0 🚖 days
Description	2.17.10
Duration	Reminder (no duration)
	0 - Minutes Hours Days Weeks
Links	Company
<u>Unlink</u>	Person
Other Staff	DEMO
Add	💮 Consultant — 🗆 🗙
Remove	
	Ok Cancel

Note: Users need to click the Popup Again button again to get a subsequent popup.

Company - IQXWeb - way to Link Head Office to Group Companies

Where there are multiple companies in a group using the same account code and a head office contact needs to see data from all companies a way of adding links to all in one action now exists in the iqxWEB record on the company contact record.



Clicking 'Add Multiple Links' will allow the user to enter an account code and link all companies to the iqxWEB record. This will save time with companies that have a significant number of subsidiaries. An employment record will be added to each company record with a Note of 'Web User Link'. Use the Delete Link button to remove a company; the employment record will also be deleted unless contact events exist.

🙉 IQXWeb U	ser Charlotte Morto	on, ABBA Ltd		
- 🥹 😨	eset Pa	ssword	Delete	
Links	User Class	CLIENT		
Rights	Name Login ID	Charlotte Morto Charlotte	n, ABBA Ltd	
	Email Address Expiry Date	*ivan@live.co.u	uk	
	Delete Link	Drag Person or C	Contact to this panel to create link <u>Add Multiple Links</u>	
	Pers	son	Company	^
	Charlotte Morton		ABBA Ltd, 63 New Street, Cambridge CB1 2QT	
	Add I	Multiple Links	×	
		Add links to	o all Companies with	
		Account coo	de ABBA01	
		Ok	Cancel	
				¥

Company - Contact Department

This field has been changed to enable the user to select from a drop down as well as entering free text thereby saving time and ensuring uniformity of spelling. This is similar to vacancy position.



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HAPH	📮 💷 星	<u> </u>	<u>Delete</u>	3	3 🔒	<u>Help</u>	٨		
Sales	Division I+IName	Infrastructure ABBA TAXIS		^	Mobile E-mail		07700 923 24 Inaaya_Carlso	-	^
	€Address	63 New Street, Cam	bridge, CB1 20	т	Direct Fax	c			
Contact Events	⊕Phone				LinkedIn				
Who's	Account Code	530			Twitter				
Interested Ranged	Invoice Address Alert	63 New Street, Cam	bridge CB1 2Q	Т	Job Title Departmer		Programmer		
Activity Sales	State	Prospect			Note	ni.	Tester1		Ý
Questionnaire	Sales State				Employed				
Notes	Consultant			Υ.	Dept. Que	stionn	Industrial		×
Mailer Lists	Select A	dd Contact T	Tree P	erson	Leave	Inc	clude Former	Include Temps	Include Pla
Documents	Sales Consultant								
Stored Selections	Name	Status	Primary	Job T	ïtle Sal	es Cons	ultant	Note	Departn \land
	Danny Austin	Client		rogramm					
0									×
Consultant	<								>

Requires System Administrator setup.

System Administrator

Thumbnail photo on the button bar of the Person form

A thumbnail of the photo stored in Person – Photo can now be displayed on the top right hand of the Person form for ease of viewing when videoing through candidate records.

To activate the thumbnail image set General Setting - Group of Settings - 3040 to Y.

Note if Person – Photo has been hidden in Modify Screen the thumbnail will not display.



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		🖳 📌 Reports Regi ration Report 💰 Data Access			3 2 3	
Temp	Division	International	^	Headline		^
Contract Events	Known As	Sana		Alert		
Contact Events		Sana Acevedo		Reg. Departments	Industrial (Perm+Temp), Financial Services (Perm)	
Get in Touch	State	Current		Dept. Questionnaire	Industrial	
Diary	Available From			Position Sought		
Diary	Personal	Male 34		Salary wanted		
Shifts	Home Phone	01632 931 813		⊞Key Skills	Food	
Shift Progress	Day Phone			HGV Licences		
Childrogroup	Mobile	07700 996 930		Fork Lift Truck		
Availability	E-mail	Sana_Acevedo@iqx.co.uk				
Requirements			۷	⊞Safety Gear		~
CV 💌	-				Max size 256Kb for reports	
Perm	and.				Load from File	
Accounts						
Accounts	Citiz A				Copy from	
Compliance	189. AB				Clipboard	

Division filtering on Notifications

2024/05/26 06:56

In Agency Setup – Notifications it is now possible to assign divisions to Notifications. Leaving the Divisions field blank means the Notification is available for all divisions.

Selecting a Division means the template will be available to a user if they are in All or the associated division.

2-17-10-b.png Note:- Each division needs to have a separate notification template allocated to it if the same template is to be used for more than one division. Alternatively leaving the division field blank allocates that notification to all divisions.

Company Contact add Departmental Questionnaire

In Agency Setup - Departments new Company Contact departmental questionnaire has been added.

🚇 Maintenance - Agency S	etup										×
Save And Close Abando	n	<u>Update</u>									
Branches		Add	Delete	He	l <u>p</u>						
Divisions	Questi	onnaires ->	Candidate	Vacancy	Placement	Reference	Timesheet	<u>Shift</u>	Company	Contact	
Departments	D	Dep	artment	Searchable	Division	Å	Analysis Code	Publish To Web	Sort Order	Extra Notes	^
Document Templates	AA	Constructio	on		Infrastructure	D1			20		i
Document Types	ED	Education		\checkmark	Support	E1		\checkmark	30	\checkmark	
Phone Types	MS	Events		\checkmark	Support	D2		\checkmark	40	\checkmark	
Boiler Plate Text	FS	Financial S	ervices	\checkmark	Corporate	B1			50		~

Display of the questions is based on the user's department.



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HAPH	i 🔋 🖬 🖕	Reports	<u>Delete</u>	3	3 🔒	<u>Help</u>	٩			
<u>Sales</u> Contacts	Division ⊞Name ⊞Address	Infrastructure ABBA TAXIS 63 New Street, Camb	bridge, CB1 2Q	T ^	Twitter Job Title Departme	ent	Programmer		^	
Contact Events Who's Interested Ranged		530 63 New Street, Cam	bridge CB1 2QT	r	Note ⊡Employed Start D Leave)ate				
Activity Sales Questionnaire Notes Mailer Lists	Consultant	Prospect				et O'ai	-		~	
Documents Stored	Sales Consultant			<u>erson</u>	Leave		iclude Former	Include Temps	Include P	
Selections	Name Danny Austin	Status Client	Primary Pr	Job T rogramm		iles Cons	sultant	Note	Departn 🔨	
									v	,
Consultant	<								> .:	÷

Company - Contact Department

This field has been changed to enable the user to select from a drop down as well as entering free text thereby saving time and ensuring uniformity of spelling. This is similar to vacancy position. The field description is set in General Settings – Terminology 830 – Company Person Department Name.

The department names are set up in Agency Setup - Contact Department

🚇 Maintenance - Agency	Setup				
Save And Close Aband	on <u>Update</u>				
Branches	Add	Delete	<u>Help</u>		
Divisions		Name	Order Depa	artment (Blank for all)	
Departments	Tester1		Cons	struction	
Document Templates					
Document Types					
Phone Types					

×

The choices displayed in Company- Contact right-hand view is limited to the user's department.



Composite Company Template Maintenance Update

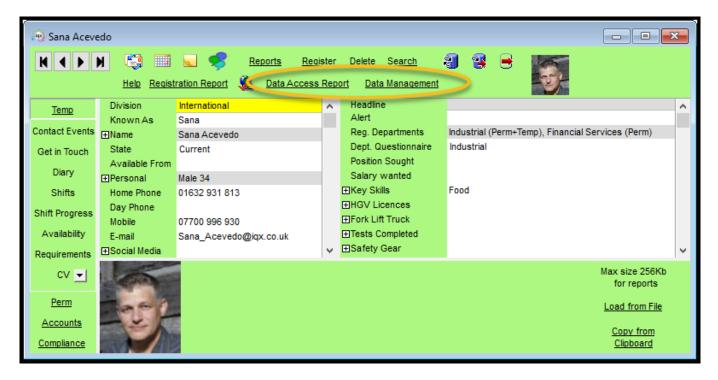
Composite Company Template Maintenance has been updated to bring into line with other approaches such as adding Departments to Shift Order Reasons.

In Temp Setup - Composite Co Pay Companies To set up a new template:

- 1. Use Add to start a new template.
- 2. Use the arrow buttons to set the fields to be included.
- 3. Use **Next** \rightarrow to open the form where you add the values.\\

List Temps will open the person selector and display a list of all temps that are associated with that template.

To modify an existing template, use the arrow buttons to add new fields the use Next to add information to the new fields.



Next \rightarrow opens the form where you add the values to the selected fields.



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Maintenance - Tem <u>Save And Close</u> <u>At</u>	p setup vandon <u>Update</u>	1						
Payroll Years Temp Desks	Demo Template Select Composite Co	~	<u>Help</u>	<u>List Temps</u>	<u>Add</u>	<u>Disconnect</u>	<u>Delete</u>	<u>Next -></u>
Pay Bands Rate Scripts Rate Schemes	Bank Reference HMRC Engagement VAT Registered VAT Number	Excluded		>		lr Company Name Bank Name Bank Sort Code Bank Account Name	ncluded	
Holidays Shift Types Shift Templates	Pay Co Reference Supplier Code Email			>	>	Bank Account Number Pay Method Pay Frequency Tax Method		
Shift Template Groups Timesheet Cancel Reasons Shift Cancel Reasons						Registration Number Payroll Address AWR Exemption Reason	n	
Shift Order Reasons Shift Progress States				<				
Inavailability Reasons liscellaneous Settings Composite Co Pay Companies				<	<			

Apply will update any changes to the records using the template.



Last update: 2018/05/01 15:27