



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.

The screenshot shows the IQX software interface for a user profile. The window title is 'Sana Acevedo'. The top bar contains navigation icons and a menu with 'Reports', 'Register', 'Delete', and 'Search'. Below this is a sub-menu with 'Help', 'Registration Report', 'Data Access Report', and 'Data Management'. The main content area is divided into several sections: 'Temp' (with a dropdown menu), 'Contact Events', 'Get in Touch', 'Diary', 'Shifts', 'Shift Progress', 'Availability', 'Requirements', and 'CV'. The 'Temp' section is expanded, showing details for 'International' division, 'Sana' known as, 'Sana Acevedo' name, 'Current' state, 'Male 34' personal info, '01632 931 813' home phone, '07700 996 930' mobile, and 'Sana_Acevedo@iqx.co.uk' email. The 'CV' section is also expanded, showing a 'Key Skills' section with 'Food' listed, and a 'Safety Gear' section. A thumbnail photo of Sana Acevedo is displayed in the top right corner of the main content area. The photo is labeled 'Max size 256Kb for reports' and has buttons for 'Load from File', 'Copy from Clipboard', and 'Compliance'.

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.



Temp Desk

Desk: Demo - Construction ABC View: Weekly Shift Year: 2017 Week: 25 Ends 24/09/2017

Go to Current Make Current Process Update Close Help

AWR Tel: Search Expand

Temp to Show: ☒ All ☐ Expire and Expiring ☐ Expiring ☐ Expired Only

Clear Column Filter State: All Working this week

Name	alert	Days before Expiry	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.

Appointment / Reminder

Popup Again: 5 Copy Delete

At: [Dropdown]

Consultant: IVAN Priority level: 5

☒ Popup Notification 0 Minutes Beforehand

Date / Time: Thu 26/10/2017 11:59 Recur every: 0 days

Description: 2.17.10

Duration: ☒ Reminder (no duration) 0 Minutes Hours Days Weeks

Links: Company [Text] Person [Text]

Unlink

Other Staff: DEMO

Add Remove

Consultant [Dropdown] 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.

The screenshot shows the IQXWeb User interface for Charlotte Morton, ABBA Ltd. The main window has a title bar with the iqx logo and the text 'IQXWeb User Charlotte Morton, ABBA Ltd'. Below the title bar are three icons (a person, a document, and a red arrow) and two buttons: 'Reset Password' and 'Delete'. The main content area is divided into two sections. The top section, labeled 'Links', shows user details: 'User Class' (CLIENT), 'Name' (Charlotte Morton, ABBA Ltd), 'Login ID' (Charlotte), 'Email Address' (*ivan@live.co.uk), and 'Expiry Date'. The bottom section, labeled 'Rights', shows a table with two columns: 'Person' and 'Company'. The table contains one row: 'Charlotte Morton' and 'ABBA Ltd, 63 New Street, Cambridge CB1 2QT'. Below the table are three buttons: 'Delete Link', 'Drag Person or Contact to this panel to create link', and 'Add Multiple Links'. The 'Add Multiple Links' button is circled in yellow. A dialog box titled 'Add Multiple Links' is open in the foreground. It contains the text 'Add links to all Companies with' and a text input field for 'Account code' with the value 'ABBA01'. There are 'Ok' and 'Cancel' buttons at the bottom of the dialog box.

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.



ABBA TAXIS

Navigation: Reports, Delete, Help

Sales | Division: Infrastructure

Contacts | Name: ABBA TAXIS

Contact Events | Address: 63 New Street, Cambridge, CB1 2QT

Who's Interested Ranged | Phone:

Activity Sales | Account Code: 530

Questionnaire | Invoice Address: 63 New Street, Cambridge CB1 2QT

Notes | Alert:

Mailer Lists | State: Prospect

Documents | Sales State:

Stored Selections | Consultant:

Consultant

Select Add Contact Tree Person Leave Include Former Include Temps Include Pl

Sales Consultant: All

Name	Status	Primary	Job Title	Sales Consultant	Note	Departn
Danny Austin	Client	<input type="checkbox"/>	Programmer			

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.



Division filtering on Notifications

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.

Questionnaires ->	Candidate	Vacancy	Placement	Reference	Timesheet	Shift	Company	Contact
ID	Department	Searchable	Division	Analysis Code	Publish To Web	Sort Order	Extra Notes	
AA	Construction	<input checked="" type="checkbox"/>	Infrastructure	D1	<input checked="" type="checkbox"/>	20	<input checked="" type="checkbox"/>	
ED	Education	<input checked="" type="checkbox"/>	Support	E1	<input checked="" type="checkbox"/>	30	<input checked="" type="checkbox"/>	
MS	Events	<input checked="" type="checkbox"/>	Support	D2	<input checked="" type="checkbox"/>	40	<input checked="" type="checkbox"/>	
FS	Financial Services	<input checked="" type="checkbox"/>	Corporate	B1	<input checked="" type="checkbox"/>	50	<input checked="" type="checkbox"/>	

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



Name	Status	Primary	Job Title	Sales Consultant	Note	Departn
Danny Austin	Client	<input type="checkbox"/>	Programmer			

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

Name	Order	Department (Blank for all)
Tester1	Construction	



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** → 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.

The screenshot shows the iqx software interface. At the top, there is a header bar with the user name 'Sana Acevedo' and several icons. Below the header, there is a menu bar with options: 'Help', 'Registration Report', 'Data Access Report' (highlighted with a yellow circle), and 'Data Management'. The main area of the window is divided into two panes. The left pane contains a list of fields for a template, including 'Temp', 'Division', 'Known As', 'Name', 'State', 'Available From', 'Personal', 'Home Phone', 'Day Phone', 'Mobile', 'E-mail', and 'Social Media'. The right pane contains a list of fields for a template, including 'Headline', 'Alert', 'Reg. Departments', 'Dept. Questionnaire', 'Position Sought', 'Salary wanted', 'Key Skills', 'HGV Licences', 'Fork Lift Truck', 'Tests Completed', and 'Safety Gear'. The 'Data Access Report' tab is highlighted with a yellow circle. The 'Next' button is also highlighted with a yellow circle. At the bottom of the window, there is a section for 'CV' with a dropdown menu and a 'Load from File' button. The 'Max size 256Kb for reports' is also displayed.

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



Maintenance - Temp Setup

Save And Close Abandon Update

Demo Template List Temps Add Disconnect Delete Next ->

Select Composite Co

Excluded		Included
Bank Reference	>	Company Name
HMRC Engagement		Bank Name
VAT Registered		Bank Sort Code
VAT Number		Bank Account Name
Pay Co Reference		Bank Account Number
Supplier Code	>>	Pay Method
Email		Pay Frequency
		Tax Method
		Registration Number
		Payroll Address
		AWR Exemption Reason
	<	
	<<	

Payroll Years
Temp Desks
Pay Bands
Rate Scripts
Rate Schemes
Holidays
Shift Types
Shift Templates
Shift Template Groups
Timesheet Cancel Reasons
Shift Cancel Reasons
Shift Order Reasons
Shift Progress States
Unavailability Reasons
Miscellaneous Settings
Composite Co Pay Companies
CIS Card Templates

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

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

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