

# **Release 2.17.12**

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

There have been a number of new features recently that require System Administrator Setup in order for them to work. These include:

- Filtering Selector results
- Default Searches and Easier access to Searches
- Temp Desk Temps view Post Code Filtering
- 1 page New Person Wizard
- Quick 'Left Message Call Back' contact events
- Filtered last contact date
- GDPR

# **Improvements to Selector Screens**

# **Filtering Selector results**

#### This feature requires System Administrator set up.

A new single search text box has been added to the top of the Person and Company Selector results screen.

<u>K</u> eyname or Num	ber *	Find	New	Fast Nev	v	Close	Help	Quick Looku	IP
Selection	All Except Contacts & Arc	Expand	Count	Update	Filter		Bu <u>c Email</u>	Bulk Doc Pack S	Self Doc Pack
Search	Name	State	Div &	Skill	Lastino	Alen	Addres	s	
tored Selections	Sana Acevedo	Perm Placed	Infrastructure	- Foo	201434		9B Glovers Bro	w	
	Jack Adams	Pre registr	Corporate -				2 Tweedale Cl		
tored Searches	Marcel Adams	Current	Corporate - Mi	idwife			134 Canopus W	/av	

				iqx				
24/05/25 21:01				2/20				Release 2.17
💮 Select Compan	у							
Keyname or #A/C C	ode	<u>Find</u>	Companies	Contacts	New	<u>Close</u>	Help	
Selection	Clients and Prospects	~	Expand	Count		Update	Filter	
Search	Company	State	Sector	Last PI Start	Ac Code	Alert	Address	
Stored Selections	•							
Stored Searches								
Reports								
	<							>

Anything typed in here will filter the on-screen results to rows that include that text value. The filter applies to all visible data.

# **Changing selector columns**

# **User modified columns**

Users can now modify the display of columns they see in most views in IQX. Columns can be moved, and their positions saved.

Right clicking on a column will allow users to carry out various actions to customise their views according to their needs.

Keyname or Num	ber *	Find	<u>New</u> Fast Ne	<u>w</u>	Close	Help	
Selection	Current Candidates Only	<ul> <li>Expand</li> </ul>	Count Update				
Search	Name	State	Div & Skill	Last TS	Alert	Remember This Layout	
Stored Selections	Isaac Baxter Quinn Bell	Current Current	- International -			Hide This Column - Alert	CI
Stored Searches	Danny Booth	Current	International - Food	201432		Default Layout	
Reports	Raphael Booth	Current	International - Food	201227			
Mailer Selections	Brian Campos Woody Campos	Current Current	International - HGV International - Food	201405		My Remembered Layout Show All Columns	
	Aubrey Christian	Current	International - Food	200929		40 Salford Aud	dlem
	Kenzie Clark	Current	International - 7.5			37 Fox St	

- Remember This Layout Stores the current layout for display until changed by the user.
- Hide this Column Hides the selected column. To ensure this is displayed when logging back in also Select Remember This Layout.
- Default Layout When selected the default view is visible. If a Departmental layout has been created this will appear.
- My Remembered Layout the user will see their last Remembered Layout
- Show all Columns If any columns have been hidden this will restore visibility of them.

**Note:** This feature does not work on Temp Desk yet as it is not generated the same way.

Some users, depending on their roles setup will be able to see some additional options.



Keyname or Num	ber * <u>F</u>	Find	<u>New</u> <u>Fast Ne</u>	<u>w</u>	Clo	<u>se Hel</u>	p Quick Lo	okup
Selection	All Except Contacts & Arch	<ul> <li>Expand</li> </ul>	Count Update	Filter		Bulk Emai	Bulk Doc Pack	Self Doc Pack
Search	Name	State	Div & Skill	Last TS	Alert	Permanahar Th	is I supurt	1
Stored Selections	Sana Acevedo		Infrastructure - Foo Corporate -	201434		Remember Th Hide This Colu	-	
Stored Searches	Marcel Adams	Current	Corporate - Midwife			Default Layout		
Reports	AdamAdkins	Pre registr	Corporate -					
Mail Merge	Tomas Aguirre Patryk Alexander	Current Current	Support - Food Infrastructure - HGV	200931 200930		My Remembe Show All Colu	1	
Bulk CV Import	Penelope Alexander	Current	Infrastructure - Bri	201648		Save Default I	ayout for Constr	uction
Mailer Selections	Shane Allen	Current	Infrastructure - HGV	200931			-	uction
	Alyssia Alvarado Betty Alvarado	Current Current	Infrastructure - FLT Infrastructure - Bar	201648		Save Named L Delete Named	-	

These are:

- Save Default Layout for Users Default department Saves the designed layout as a default for the User's department.
- Save Named Layout Allows the User to create different column layouts for different purposes.
- Delete Named Layout Allows the User to delete their named layout.

# Filter within a view- Company: Contacts, Vacancies, Placements. Vacancy Placements

A new filter box has been added to the above views to allow filtering on any column in this view, e.g.

HAPH	🕼 🗐 🐷	Reports Delete	a 🦉 📑	Hel	Ð			
Contacts	€Name	ABBA Ltd		^	<b>⊡</b> Contact			
	Address	63 New Street, CAMBRIDGI	E, CB1 2QT	5	Primary			
Contact Events					Un-Subscribe to			
AWR	Account Code	ABBA01 (Invoice)			Direct Phone			
	Invoice Address	63 New Street, CAMBRIDGI	E CB1 2QT		Mobile			
AWR Closures	Alert				E-mail			
Vacancies	State	Client			Direct Fax			
Progress	Consultant	IVAN			Job Title			
Flogiess	Source	None			Department			
Placements	Old Account Code			~	Note			
Withholds	Select A	dd Contact Tree	Person	Lean	ve Include Form	er Include Temps	Include Placed	Filter
Questionnaire	Name	Status Prim	ary Job Title		Note	Department Sta	art Date Leave D	ta Te
Notes	Charlotte Horton	Client	Programmer			06/0	1/2009	Г

# Ability to open a company more than once, with different contacts selected

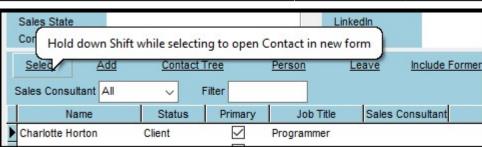
This is done from the Contacts view, holding down Shift while clicking the Select button or doubleclicking the grid row.

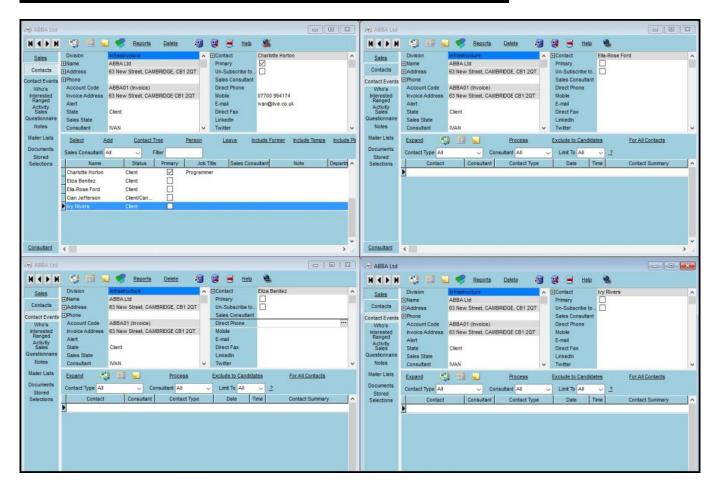
A new balloon help on the button explains this feature.



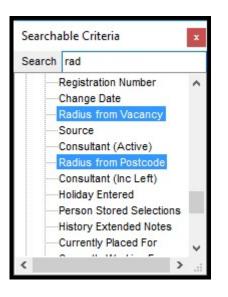


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# Search criteria box changes





A filter box has been added to the searchable criteria view. When text is added to the box matching criteria are highlighted in blue.

Where tree items have no matching criteria, the search headers will collapse. Where search headers have matching criteria, they will open.

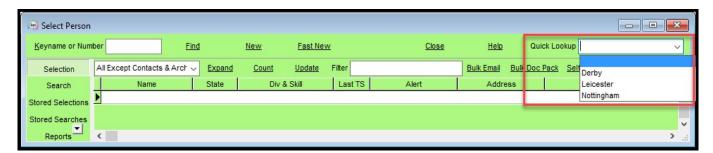
# **Default Searches and Easier access to Searches**

#### This feature requires System Administrator set up.

In the Person Selector there is a new feature allowing users quick use of standard searches that have been set up per their department.

The searches need to be set up by Sys Admin so that they are displayed in the drop down for use. If one of the Quick Lookup list is chosen,

the search / selection is executed immediately, and the results displayed. Useful for recently registered Candidates, compliance lists, location, skills set.



The users with the rights to Setup and maintain the selections do so via the Maintain Quick Lookups form on either Stored Selections or Stored Searches.

Keyname or Numb	ber	Find	New	Fast New		Close	Help	Quick Lookup
Selection	IVAN	~	Retrieve	Save	Delete	Maintain Quick	Lookups	
Search	Owner	4		Name				
Stored Selections	IVAN IVAN	1.44	Quick Lookup c	of Stored Selection	ns and Search	es		
Stored Searches	▶ IVAN	D	epartment Constru	iction	~	Save and Close	Abandon	Update
Reports	IVAN	D	rag Stored Selectio	ons and Searches I	here to Add			
Mail Merge	IVAN IVAN			Name		Sort Orde	er	
Bulk CV Import	IVAN		Leicester					
Mailer Selections	IVAN		Derby 4					
	IVAN		Nottingham					
	IVAN							
	IVAN							

Select the department this choice is to be displayed to. The content does not have to be departmentally linked.

To add to the list drag and drop from the main list onto the Quick Lookups form.

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A sort order can be added to allow the more frequently used searches/selections to appear at the top of the list.

# **Temp Desk - Temps view - Filtering**

Desk	View		rear We									
Demo - Constr	ruction ABC 🗸 Weekly S	Shift 🗸 2	2017 🗘 37	÷ Ends 17/	2/2017	Current)	Process	Update	Close He	<u>lp</u>		
Vacancies	Search Expand Holiday	Pay Current	t Pool	Fiter	Av	ailable Unava	ilable On Holid	ay Add Shifts	Book Shifts C	onfirm Shifts T	imesheet	Postcode Distance 0 + Miles Find
Temps Placements	Temp	Person 1	Person 2	Person 3	Monday 11/12/2017	Tuesday 12/12/2017	Wednesday 13/12/2017	Thursday 14/12/2017	Friday 15/12/2017	Saturday 16/12/2017	Sunday 17/12/2017	Alert
Vacancy	Zimmerman, Kane	1978-10-21	Zimmerman	ZIMMERM								
Shifts	Wade, Tara	1976-04-23	Mada	WADE TARA								

In Temp Desk – Temps a text filter box has been added to allow filtering on data columns. The Weekday columns are not included.

# Temp Desk - Temps view - Post Code Filtering

# This feature requires System Administrator set up and purchase of the Postcode Distance module.

If you have postcode distance a search box section appears. When a post code is entered in the box and a maximum distance specified the Postcode Distance column

will display the distance for each temp. These can be sorted ascending or descending.

esk	View		rear We									
emo - Constr	ruction ABC 🗸 Weekly	Shift V	017 - 37	÷ Ends 17/1	2/2017	Current)	Process	Update	Close He	<u>10</u>		
Vacancies	Search Expand Holida	v Pay Current	Pool	Fiter	Av	ailable Unava	ilable On Holid	ay Add Shifts	Book Shifts C	onfirm Shifts T	imesheet	Postcode Distance 0 - Miles Find
Temps Placements	Temp	Person 1	Person 2	Person 3	Monday 11/12/2017	Tuesday 12/12/2017	Wednesday 13/12/2017	Thursday 14/12/2017	Friday 15/12/2017	Saturday 16/12/2017	Sunday 17/12/2017	Alert
Vacancy	Zimmerman, Kane	1978-10-21	Zimmerman	ZIMMERM								
Shifts	Wade, Tara	1976-04-23	Wada	WADE TARA								

# **Direct Engagement**

# This feature requires System Administrator set up (request for a switch submitted)

A new button has been added to Placement – Rates which allows an agency to modify the arrangement between the client and candidate so that when the candidate is paid directly by the client the agency invoices a fee on the margin rate only.



	l 🗐 🔲 🐱	- 🤧	Vacancy	Progress	Report	<u>s Help</u>	<u>Delete</u>	Withdraw	<u>test</u>	60	1 😗 🤅
Details	Candidate	Ayesha					Start Date		11/12/201	17	
Split	Company		Insurance U	k Ltd., Jami	ie Hall		Leave Date				
	Job Title Client Department		Contract				Department Consultant		Construct IVAN	ction	
ontact Events	PO Number						Our Ref.		4122		
Rates	Contract						Concurrent o	r Shifts			
Timesheets	Placement Date	20/12/2	017				Override IR35	Public Sector			
Accounts	Override Invoice.						Is the sky blu	e?			
Staged							Days per We	ek	5		
	Rate Scheme Sta	ndard - v	vith Ltd.		Show	Historic R	ates 🔽 Shov	v Margin Re	evert to Vaca	ancy Rat	es
Questionnaire			-		-		Start				- Alexandria
Notes	Description	Per	Pay Rate	Total Cost	Charge Rate	Margin	Date	End Date	Grade AWR?	Ltd	Add Rate
Contacts	Standard	Hours	8.00	8.00	9.50	15.79 %			N	Y	Delete Rat
Documents	Time x 1.5	Hours	13.22	13.22	15.00	11.87 %			N	Υ	Override us
Expense	Standard Time x 1.5	Hours	8.38 13.52	8.38 13.52	10.50	20.19 %			Y	Y	Rate Scher
Benefit	Time X 1.5	Hours	13.52	13.52	16.00	15.50 %			T	·	Direct
ocation Map										- 1	Engageme
Directions											
Deles											2
acancy Roles											

On selecting Direct Engagement, the placement will display an alternative Rates view, using the Rate Scheme pay band Descriptions but ignoring the amounts, which will be blank.

The consultant must add the Fee directly into the view. The Fee will be used to create the invoice lines. The Pay and Charge columns are also manually added and are

for Placement information only and will not generate pay in a timesheet.



H I I H	🥴 🖬 🖬	Yacancy	Progress	Reports	<u>Help</u>	Delete	Withdray	v	test	3	2	•
Details Split Contact Events	Candidate Company Job Title Client Department	Ayesha Flores Aspen Insurance DE Test Contract	Uk Ltd., Jamie	Hall	Le	art Date eave Date epartment		C	1/12/2017 construction /AN			-
Rates	PO Number Contract Placement Date	20/12/2017			Co	ur Ref. oncurrent or verride IR35		[	122			
Accounts	Override Invoice					the sky blue			(3 C).			
Staged				dan distance		ays per Wee		5				
Invoices Questionnaire	Direct Engagement   <u>Add</u>	Rates. The Fee is <u>Delete</u>		bill. Pay and to Agency El	Charge F	Rate are for		-				
Invoices	Add		<u>Revert</u>		Charge F	Rate are for	in formation	only.	Рау	Cha	-	
Invoices Questionnaire Notes		Delete	<u>Revert</u>		Charge F	Rate are for	in formation	only.		0	60.00	
Invoices Questionnaire Notes Contacts	Add Standard	Delete	<u>Revert</u>	to Agency E	Charge F mploymer Hours	Rate are for	in formation	ee 10.00	Pay 50.0	0	60.00	
Invoices Questionnaire Notes Contacts Documents Expense Benefit	Add Standard Time x 1.5	Delete	<u>Revert</u>	to Agency E	Charge F mploymer Hours Hours	Rate are for	in formation	ee 10.00 15.00	Pay 50.0 60.0	0	60.00 75.00	
Invoices Questionnaire Notes Contacts Documents Expense Benefit Location Map	Add Standard Time x 1.5	Delete	<u>Revert</u>	to Agency E	Charge F mploymer Hours Hours	Rate are for	in formation	ee 10.00 15.00	Pay 50.0 60.0	0	60.00 75.00	

It is possible to revert Direct Engagement rates back to the Agency Rates by clicking the Revert to Agency Employment button.

The displayed Pay and Charge columns are actually the ExtraRate1 and ExtraRate2 columns and are information only.

Invoicing works as normal using the Fee amount.

# 1 page New Person Wizard

#### This feature requires System Administrator set up.

In the person selector it is possible to allow divisions to create a new candidate using a truncated version of the New Person wizard. The button Fast New opens a one-page wizard.

Select Person						
Keyname or Num	ber <u>F</u>	ind <u>New</u>	Fast New	Close	<u>Help</u> Quid	ck Lookup
Selection	All Including Archived/DNU	Expand Count	Update Filter	B	Bulk Email Bulk Doc F	Pack Self Doc Pack
Search	Name	State Div	& Skill Last TS	Alert	Address	<b>^</b>
Stored Selec is	> <					× 



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# Quick 'Left Message Call Back' contact events

#### This feature requires System Administrator set up.

There may be times when a contact event is required to record a contact without the need to add any more detail. For example, 'Left Message to Call Back' contact events.

To speed up saving this type of contact event it is now possible to complete selected contact events in two clicks. The Contact Summary will be automatically populated with the contact event type text.

# Filtered last contact date

#### This feature requires System Administrator set up.

Some Contact Events types can be set to be deemed a genuine contact. Some calls and emails never get a response and are an attempt at contact rather than valid. If this is set up for the Agency then searching for Last Contact Event will be for a genuine contact.

**If set up by your system administrator** a new searchable item can be added to the search criteria for this information.

e.g.

🛞 Select Person										
Keyname or Numb	er *	Find	New	Fast	New			Close	<u>Help</u>	Quick Lookup
Selection	Criteria	Hints CI	ear Department	Construction	~	Perm	Temp	Either	Search	
Search	All of:				Any of:		Sea	rchable Criteria		x
Stored Selections	Filtered conta	ct even ≥ [	04/12/2017 ~				Sea	rch filter		
Stored Searches							÷	* PAYROLL ***		^
Reports								N.I. No. Payroll Number		
Mail Merge								Company Name		
Bulk CV Import								Pay Method Bank Account I	Number	
Mailer Selections								Bank Sort Code	•	
								Bank Ref		
								Tax Method		
								Tax Code		
								Has a Payroll A		
								Last Contact Ev		
								Filtered contact		
								Contact Event	Туре	
								Contact Event	IGAL	×.
							<		>	

# GDPR

IQX has created a suite of tools available to help agencies meet their data protection responsibilities as part of the upcoming General Data Protection Regulation 2016 due to come into force on 25 May 2018. To maximise the effectiveness of these tools agencies should

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ensure these tools are incorporated into a robust data protection procedure.

Only users with the relevant roles and settings will be able to see and use them.

#### This feature requires System Administrator set up.

## **Data Access Request Report**

If a candidate requests a copy of the information held in the database about them, it is possible to obtain this information by clicking the GDPR button and selecting Data Access Report in the Person record.

The information will be displayed in pdf format.

🛞 Sana Aceve	edo					[	- • ×
₩ ◀ ▶	N 🤤 🎟	🖬 🥩 🗌	Reports Regi	ster	<u>Delete Search</u>	a 🤋 🔒	
	<u>Help</u> <u>Regist</u>	ration Report	B GDPR				
Temp	Division	Infrastructure			Data Access Report		^
		Sana Acevedo		C	Data Management	stral (Perm+Temp)	
Contact Events	State	Perm Placed	-	-	Dopt. Questionnaire	Inductrial	
Get in Touch	Available From				Position Sought	Electronics	
Diana		Female 34			Salary wanted		
Diary -	Home Phone	01632 931814		V	⊞Key Skills	Electronics, Food	~
Shifts	Position Sought		Electronics				
Perm	Salary wanted						
Accounts			Electronics, Food	1			
	HGV Licences						
Compliance	FFFork Lift Truck						Y

The Data Access Report delivers just one candidate's information.

#### All requests for this information are audited.

It is strongly recommended that the Data Access Report and any attached documents are reviewed to prevent disclosure of information that might affect another person's right to privacy.

The Data Access Report can be redacted using the same process as redacting Compliance Documents. Areas can be blanked with either white or black to ensure that data the candidate should **NOT** see, like personal details of client contacts, is removed.

🛞 GDPR d	lata for Jack	Adams									
White	Black	Stamp	Delete Selected	Delete All	Data Management	Save	Email	Print	Remove Page	Cancel	Help
J	ack Ada	ms	C	Data Ad	ccess Requ ADAM	est R 18 JAC		t			?

Where there are documents which cannot for some reason be included in the Data Access Report they will be included in the zipped file containing the Data Access



Report.

Clicking Email button will send the report to the email address held in the candidate record. Therefore, it is important to ensure this email address is correct.

Two emails are sent to the candidate; one will be the report and the second will be the password to gain access to the report pdf.

It is possible to Save the Data Access Report and associated files to a user selected folder. This will allow for other methods of transmission of the report where the zipped file is too large to be sent as an email.

It is also possible to Print the report and sent it to the candidate by mail.

# **Contact Events**

A contact event can be created to record when a Data Access Report is either emailed, saved or printed. These Contact Event will be saved in Person Contact Events.

Jack Adams	1 🧐 🖩	istration Report	<u>orts Registe</u> <u>GDPR</u>	er <u>Delet</u> i	<u>s</u>	earch 🇃 😨	•			3
Temp	Available From				^	Alert				^
Contact Events	⊕Personal     Home Phone	40				Reg. Departments		g (Perm+Temp)		
Get in Touch	Day Phone				~	Dept. Questionnaire Role	Nursin	Ig		~
Diary -	Expand	Contact Type All	~ Consul	tant All		V Limit To All		Process ?		
Chiffo	Consultant	Contact Type	Date	Time		Contact Summary		Link	Outcome	^
Perm	VAN (	GDPR	21/12/2017	15:08 G	DPR F	Report Sent	1.1			
Accounts	IVAN (	GDPR	14/12/2017	11:47 G	DPR F	Report Saved				
Compliance	IVAN (	GDPR	14/12/2017	11:44 G	DPR F	Report Printed				~

Where a Data Access Report is save electronically and provided a GDPR Contact event has been set up the pdf password will be saved in a Contact Event.

🛞 Contact Ev	vent Jack Adam	s							
KAPH	<b>G H</b>		<u>Reports</u>		<u>Help</u>	3	2	3	
Text Letter Text	Person Made By Date Time Type Summary Callback Callback Time			ed				ck Mobile E-mail	07700 921428 ivanbaldwin@live.co.uk; Jack_Adams@iqx.co.u
	Priority Created By Created <u>Reply as Text</u>		2017 11:47 art Text		Duplicate	v			
	<u>Send Text</u> The zip passwo			<u>Send E-mail</u> DB[FjK`"M6= *(	Reply to E-m	<u>nail</u>			



# **Data Management**

## Warning! This is irreversible and will be audited.

After receiving and considering a request from a candidate to be forgotten or for their details to be removed the GDPR - Data Management drop down on the Person

Record and in the Data Access Report view can be used to modify a candidate's record.

Varning! This is Irreversible and will be Audited	Apply	Close	<u>Help</u>
Options	Select		
Anonymise			
Remove Contact Events			
Contact Events Before Date (blank=all)			
Remove Documents			
Remove Compliance Documents			
Remove CV			
Remove Photo			
Remove Progress/Shortlist			
Remove Availability/Holiday			
Remove Contact Details			
lemove IQXWeb			

The Anonymise option anonymises all personal data in the selected record. The candidate record title will be changed to the candidate's personid.

9092008023C				23
N 🧐 🗐	Reports Register	Delete Search	3 2 B	
Help Regist	ration Report 🝓 Data Access Rep	ort Data Management		
Division	Infrastructure	Headline		~
	Anonymised Anonymised	Alert		
State	Archived/DNU	Reg. Departments	Events (Temp)	
Available From		Dept. Questionnaire	Events	
Personal	Male 48	Position Sought		
Home Phone		Salary wanted		
Day Phone		General Skills	Barman, Waiter	
Mobile		⊡Chef Skill		
E-mail		Grade	Grade 2	
and the second		Chef Expiry Date		
The second s	Anonymised, Anonymised, Anonymise	HP Source		
Source	None	=***Person Q'aire***		
Consultant	MAN	Location Zone	Any Area	
		Emergency Contac		
Last Updated	18/05/2012 10:00:55	Driving Licence	Full, Clean	
		Image: Second	Image: Second	Image:

There may be areas where personal details may be stored in text on the person record and placement records. It is recommended that these locations like

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Person – Notes are manually reviewed at the same time to ensure the maximum possible anonymising takes place.

The Candidate's audit trail will also be deleted.

# **Other Options**

- Remove Contact Events can be refined to only remove those up to a date by using Contact Events Before Date field as well.
- Remove Documents, Compliance Documents, CV, Photo, Progress/Shortlist, Availability/Holiday, Contact Details and IQXWeb logins are all individual options.
- Delete All (if no shifts and placements) Removes the entire record, unless there are shifts, and placements linked to the Person record.

# **Obscuring Bank Account Number**

# This feature requires System Administrator set up.

Complete bank account numbers can be obscured. Users will be able to see the last four digits of the account number for confirmation purposes.

# **System Administrator**

# **Filtering Selector results**

This feature is activated in Maintenance – Users – Roles – Show filter boxes on Person and Company Selectors.

	Save and Close Ab	andon <u>Update</u>	No Password	Delete	Help Reports	۵.
Roles Layout Settings	Name Keyname Login Name	Demo User DEMO USER DEMO	Divi	nch ision ault Department	Scotland Infrastructure Industrial	
Questionnaire	Role Group All	→ Search				
Division Access	Group	Role		Search Criteri	a Group Assigned	Expires
Department Maintenance	GENERAL Ouick L	ookun Facility on Person Se	lector			
opup Escalations	GENERAL Show f	ilter boxes on Person and C	ompany Selectors		$\checkmark$	

# Setting a Default view and extra columns

The setting up of custom columns in IQX have been updated to allow them to be more easily defined. In Database Setup – Custom Grid Columns it is possible to view

and add current custom columns by Department/Form and View. Select the Department, Form and View.



Save And Close Abandon	Update								
ictionary of Searchable Data items	Department Defaut	V Form PERS	ONSELECTOR	View D	ETAILS V				
Custom Word Merge Fields	Ad	d <u>Delete</u>	Help						
Custom Grid Columns	Column Name	Caption	Position	Column Type	Data Type StringLength Display Forma	Descriptor Pick List	Check Values Sortable	Sort Expression Display Width	Notes
Audit Items	PS1	Div & Skill		6 DataField	String	(select stri		22	
	PS3	Last TS		7 DataField	Integer	(select ma	$\checkmark$	8	
Index Server	Xbox	Div & Skill test		0 DataField	String	(select stri		32	
License									

There is a wiki page to assist with specifying sensible data for new columns Here

Existing switchable fields have been migrated automatically to global columns.

Existing columns can be hidden by inserting 0 in the Position column. Specifying a specific position can be problematic as the position of a column is also affected by hidden columns. Therefore, some trial and error may be necessary to get a column to appear in the desired position.

**Tip:** Set the position of a custom column by moving it within the relevant view, right clicking on a column header and saving it as a either a Departmental or Named Layout.

**Note:** If you create a custom column in a department which is not your User default department you will not be able to see those columns.

You would need to change your default department and then reopen the person selector to see them displayed.

If you want all departments to see a custom column it would need to be generated in the Default department.

# **Default Searches and Easier access to Searches**

Quick Lookups are maintained by Users who have Departmental or Full Maintenance rights and have the role - Quick Lookup on Person Selector activated.

HAPH	Save and Close Al	<u>oandon</u> <u>Update</u>	<u>No Passw</u>	ord Delete	<u>Help Reports</u>	<b>b</b>
Roles Layout Settings	Name Keyname Login Name	Demo User DEMO USER DEMO	^ ~	Branch Division Default Department	Scotland Infrastructure Industrial	
Questionnaire	Role Group All	✓ Search				
Division Access Department Maintenance	Group GENERAL Quick	Dole Lookup Facility on Person Se	lector	Search Criteri	Croup Assigned Expire	s

The end user will also need the Quick Lookup Facility on Person Selector activated.



# 1 page New Person Wizard

The availability of Fast New is division based and is selected by ticking the relevant box in Maintenance – Agency Setup – Divisions.

Maintenance - Agency !																
ave And Close Abando	n <u>Update</u>															
Branches	Add	Delete	Colour		<u>Help</u>				Chan	e Doc Pack						-
Divisions		Name	Analysis	Default Payroll		Override Invoice	Statement	Timesheet Dispatch	Timesheet Dispatch	Imesneet	Timesheet	Default Document Pack	Short	Publish To	Web	Show Fast Person
Departments	and the second s			Identifier		Layout	Frequency	Default	Sent Default	Title	Email Body	Pack	Code	Web	Description	Wizard
Document Templates	Corporate		A3	3	5220351		None					Initial Pack	_W_		Corporate Test	
Document Types	Infrastructure		A1	1	1674448		None								Infrastructure	
Document Types	International		A2	2	65535	Sales Inv	None								International	
Phone Types	Support		A4	A	255	an estimation of	None								Support	
Boiler Plate Text	TestDiv						None							П	TestDiv	

Questions in the departmental and general Candidate questionnaire can be selected to appear in the Fast New wizard by using 1 in the Wizard Group.

iqu	Questionnaire	Maintenance												-	
			Candidat	e Quest											
C	Questions	Add Delete Undo	# for id		Fine	d Questic	ons	Redo	Order		Font C	olour	Complia	nce Mess	ages
	Order Question	Question Description	Туре	Min Step Size	Jnits R	equired	Group	Wizard Group		Web Publish	Web View			Heading Answers	Expiry A
	110 DCL	Date Cleared	Date				-220	0			$\checkmark$				
Þ	105 CL1	Clearance Status	Single Selection				-220	1			$\checkmark$				
	899 MS	Acceptance	Single Selection				-300	0							~
<															>
(	Choices	Add Delete Undo							Sub	Cho	pices	Add	d D	elete	Undo
	Order Choice ID	Choice Description	Autofill search words (comma separa	ated) Value	Web H	ide Anal	lysis	^	Or	der C	hoice ID	Sub C	hoice Des	cription V	/alue \land
•	10 _	Not Reg						~							· · · ·
<								>	<						>
		Update	Save and Close Aba	ndon		Help									

The User - Layout Settings - Hide Person New applies to both the Fast New and New button.

HAPH	Save and Close Ab	andon <u>Update</u>	No Passw	ord Delete	<u>Help</u>	Reports 🔮	
Roles Layout Settings	Name Keyname Login Name	Ivan Baldwin BALDWIN IVAN IVAN	^ ~	Branch Division Default Department	North West Infrastructu Constructio	ure on	-
Questionnaire Division Access Departme 😜 [	Search new		tiveto E	cpires Note		•	

Fast New and New Buttons hidden in Person - Modify Screen - Hide Person New Button.



🚇 Jack Adam	s					
KAPI		🖳 🍼 <u>Reports Register Del</u> tration Report 🍓 <u>GDPR</u>	<u>ete S</u>	earch 🗿 😫	8	
Temp		Corporate Jack Adams	^	Alert Reg. Departments	Nursing (Perm+Temp)	^
Appointm _ js		Pre registration		Dept. Questionnaire	Nursing	
Warning	Available From		~	Role		¥
Perm	NOTE - some item	is may not be available to you even if not hidde	en, beca	ause of rights set by your	system administrator.	
Accounts	Cite	ange Activate		Notes		^
Compliance	Hide Person Net	w Button				

# Quick 'Left Message Call Back' contact events

To set up this feature the relevant contact events can be identified in Agency Setup - Contact Event Types by ticking the 'Auto close on Select'.

🚇 Maintenance - Agency S	Setu	р							×
Save And Close Abando	<u>n</u>	Updat	<u>e</u>						
Branches		Add	Delete	<u>Help</u>					
Divisions		Order Code	Description	Email Signature (Blank for Default)	Combo Box Filter	Client Email Attachment(s)	Person Email Attachment(s)	Auto-close on Select	^
Departments		999 ES	Employment Agreement			· · · · · · · · · · · · · · · · · · ·			
Document Templates	1	333 LM	Left Message to Call B						¥

**Hint:-** Give this contact event type a low order number so that it appears near the top of the drop down list.

🚇 Patryk Alex	ander							
	N 🧐 🗐	📃 🥩 Repor	ts <u>Register</u>	Delete Search	- 🕄 😨	3		
	Help Regist	ration Report  🍓	GDPR					
Temp	Division	Infrastructure	^	Alert				^
	Mame	Patryk Alexander		Reg. Department	s Industrial (I	Perm+Temp)		
Contact Events	State	Current		Dept. Questionna	aire Industrial			
Get in Touch	Available From		~	Position Sought				×
Diary	Expand Co	ontact Type All	✓ Consulta	Int All	Limit To All	~	Process ?	
Perm	Consultant	Contact Type	Date	Time Cor	ntact Summary		Link	^
Accounts	NAN Le	ft Message to Call B 2	21/12/2017	16:22 Left Message	e to Call Back			
0	States and second second							~
Compliance	<							<b>&gt;</b>

# Filtered last contact date

A new Maintenance – Agency Setup screen has been setup to allow the identification of the last actual contact with a Person out of available contact events.

Contact events which meet this standard can be selected by ticking the adjacent Include box in Agency Setup – Person Active Contact Events. Selection is by division.

# 17/20

#### 2024/05/25 21:01

Release 2.17.12

🕀 Maintenance - Agency S	Setup				
Save And Close Abando	on <u>Update</u>				
Frequently Used Towr	Division Infrastru	cture	✓ Signifyin	ng actual contact with Person	
Frequently Used Countries	Sort Order Cod	e Description	Include		
equently Used Countries Vacancy Roles	CD	Decline Interest	$\checkmark$		
vacancy Roles	CI	Confirm Interest	$\checkmark$		
Notifications	5 LM	Left Message to Call B			
Branch Images	10 01	Cold Call/Canvas Call	$\checkmark$		
Configlion	10 S1	Sales Lead First Contact	$\checkmark$		
Config Log	11 S2	Sales Lead Proposal	$\checkmark$		
Person Active Contact Events	12 S3	Sales Lead Signed up	$\checkmark$		

The selections are recorded in the ContClassPersonDivFilter table on the database.

Once triggered a new column, FilteredLastContactEvent, in the Person table records the date/time of the last contact event type identified as an actual contact.

This information can be searched on and added to reports.

In addition, this information can be searched on once a new searchable data Item is set up in Database Setup - Dictionary of Searchable Data Items.

🖗 Maintenance - Database Setup	2									
Save And Close Abandon	<u>Update</u>									
Dictionary of Searchable Data Items	Location Pers	on	✓ <u>Add</u>	Delete	<u>e</u>	Help				
Custom Word Merge Fields	Location	ID	Description		Sort Order	Туре	Combo Selections	Database Item	Complex Expression M	in Step Units Gro
Custom Grid Columns	Dereon	DNC			21	Boolean		not used	isnull(getquestdate	
Audit Items	Person	FCE	Filtered contact event		3415 [	Date		person.FilteredLastContactEvent		

Once set up it is possible to search on this data.

Keyname or Numb	er *	Find	<u>New</u>	<u>Fast</u>	<u>New</u>			Close	<u>Help</u>	Quick Lookup	
Selection	Criteria	Hints C	lear Department	Construction	~ ~	Perm	Temp E	ither	Search		
Search	All of:				Any of:		Search	able Criteria	x		
tored Selections	Filtered conta	ct even ≥	04/12/2017 🗸								
tored Searches							Search				
Reports							1 .	AYROLL *** N.I. No.	^		
								ayroll Number			
Mail Merge							1 1 1 1 1 1 1	Company Name (	Payroll)		
Bulk CV Import							1 1 1 1	Pay Method			
ailer Selections							11 10 7	Bank Account Nu Bank Sort Code	mber		
								Bank Sort Code Bank Ref			
								CIS Expiry Date			
							T	ax Method			
								Tax Code			
								las a Payroll Add	iress		
							1 1 1 1	A5 Requested	ent		
								Filtered contact e			
							2 2 5000	ast Contact Eve			
							1 1 1 1 1 1 1	CE Type and Date			
							1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1	Contact Event Ty	pe xt ❤		



# User Role - Can maintain users

A new user role has been added to give the ability to add new users and maintain existing users without having other maintenance rights.

The role is visible in Maintenance - Users - Layout Show User Selector.

🛞 Demo User									×
	Save and Close Ab	andon <u>Update</u>	No Passy	<u>word</u>	<u>Delete</u>	<u>Help</u>	<u>Reports</u>	۲	
Roles	Name	Demo User	^	Branch		Scotland			^
Layout Settings	Keyname Login Name	DEMO USER DEMO	~		)epartment	Infrastruc Industrial			~
Questionnaire Division Access	Search	C		D-f	·d1.	D 0	!! /	^	
Department	Group	Setting	Activate I	Expires	Note	s			^
Maintenan	USER Show !	SQL Tool (Non-Modal)							
Popup Escalations	USER Show	Jser Selector							~

This role can be accessed via the Select drop down menu.

Progress	
Placements	
Contact Events	
Chat	
Invoices	Ctrl+F11
Direct Invoice	Alt+F11
Direct Self Bill Invoice	Shift+F11
Timesheets	F11
Miscellaneous Reports	
Recent Records	Ctrl+F2
SQL Tool (non-modal)	
Users	

Clicking on Users opens the same Users view as Maintenance - Users.

#### Any changes to a User record are audited.

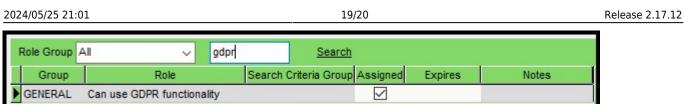
Note:- A User will be able to access their OWN record and change their own rights.

# GDPR

# **Data Access Request Report**

To set up access the Data Access Report and Data Management function the user must have the 'Can use GDPR functionality' role set up in Maintenance – User – Roles.





In addition, the user must have 'Can send CV as PDF and CV packs' ticked to enable the Data Access report to be generated correctly.

WP	Cannot mail merge by text		
WP	Can create and edit CVs		
▶ WP	Can send CV as PDF and CV packs	$\checkmark$	Requires W
<			>

General Settings - Settings 1460 should be blank.

General Settings				×
Name or Notes pdf	Search Group All V Branch	All v Get Colour Save a	and Close Abandon Update Help	
No Group	Nume	Vuide	Notes	^
1460 Settings	Address for installed Word to PDF Convertor			

The report GDPR.rtm needs to be in the Reports folder. Please contact IQX for a copy of this report.

A report request is logged in Database Diagnostics- Audit trail.

🚇 Database I	Diagnostics									• 🗙
IQX licences	in use: 1			Refre	<u>esh</u> <u>(</u>	Close				
Database Details	Audit Type All	~	Date 21/12/2017	7 🗸 to 21	/12/2017 🗸	<u>Count</u>	Export	/Archive		
a second and a second	Audit Type	Description		When	Login Name	Old Values	New Values	RecordID	Connection ID	^
Engine Details	REPORT	C:\IQX\Reports\GDPR.rtm	21/1	2/2017 14:36	IVAN				6	
Engin	REPORT	C:\IQX\Reports\GDPR.rtm	21/1	2/2017 14:3	✓ IVAN				6	¥

# **Data Management**

# The delete and anonymising features will make recovery of accidentally anonymised/deleted information difficult and in some cases expensive to recover.

Use of this button and any actions in the subsequent view are audited and logged.

To check logging insert the following into SQLTool:

select \* from datamanagementlog order by whenentered

# **Contact Events**

The Contact Event type must be created in Agency Setup – Contact Event Types and identified in General Settings – Email/Telephony 128.



👻 Maintenance - Agency S	etup			×
Save And Close Abando	n <u>Update</u>			
Branches	Add	Delete	Help	
Divisions	Order Code	Description	Email Signature (Blank for Default) Combo Box Filter Client Email Attachment(s) Person Email Attach	1
Departments	▶ 608 GD GD	PR		
Document Templates	<		>	

4	Ge	General Settings												×
	Name or Notes gdpr			Search	Search Group All V Branch All			✓ Get Colour	Save	and Close Abandon Update Help				
	N	lo	Group Name			Value			Notes					
	·]	128 E-Mail/Telephony Contact Event Type Code for GDPR Report Sent				GD						v	] ~	

# **Obscuring Bank Account Number**

To obscure bank account numbers go to Maintenance – General Settings – Privacy – Star start of Bank Account Number and set the values to 'Y'.

