



Release 2.17.2

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.

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- [System Administrator](#)
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Users

Ability create a credit note directly from an invoice

When crediting an invoice, there may be times when the underlying Company - Accounts settings have changed in the intervening time. This can cause accounting errors in crediting the invoiced amount. Therefore, an alternative approach has been added whereby the credit note is credited by creating a negative of the original invoice. Replacement timesheets can be included in the process.

Direct Link from IQX to Broadbean

A new way of accessing Broadbean directly from within the IQX Broadbean view has been added.

A new Rank button has been added in the Broadbean IQX view.

Name	Forename	Surname	Salutation	Address	Street	Town	Postcode	Email	Phone	Rejection
------	----------	---------	------------	---------	--------	------	----------	-------	-------	-----------

Once a vacancy has been posted to Broadbean and candidates have applied for a position Users have passwordless access the vacancy in Broadbean via the Rank button.

Then users can pull through candidates into the Broadbean IQX view.

This requires System Administrator setup.

Broadbean - Auto retrieval of all applications

A new General Setting has been added to exploit the ability to download Broadbean applications to the Broadbean view, in the past x days. This is not to import or shortlist the candidates, just retrieve their application into the Broadbean IQX form.

An xml job will import current candidate applications from Broadbean into the IQX Broadbean view based on the number of days offset from the current date.

The job will populate the relevant Broadbean vacancy/candidate view (pulling down the CV, email body and xml format), for review by the User.



This job does not automatically import applicants into person records.

This requires System Administrator setup.

Method of identifying Private Sector Companies re IR35

A new tick box had been added to both versions of Company - Miscellaneous 'Private Sector outside IR35' to enable agencies to identify which companies are Exempt from the Public Company IR35 regulations.

Questionnaire	Days Credit	14
Notes	Private Sector Outside IR35	<input type="checkbox"/>
Extra Notes	Managed by Portal	<input type="checkbox"/>
	Invoice Frequency	Immediate
Group Tree	Company Reg. No	

Also, a User role has been added Can override Public Sector client. This enables a user to edit 'Override IR35 Public Sector' tick boxes in Placement - top right window and Vacancy - Misc. Payroll transfer will need to be amended to use these settings according to the end payroll requirement.

Web Publish	Payroll Co.	1
	Analysis Code	
Miscellaneous	Cascade Time	
	Cascade Level	0
Location Map	External Price List	
Shift Templates	Send Shifts To Payroll	<input type="checkbox"/>
	Override IR35 Public Sector	<input type="checkbox"/>
Vacancy Limits	Timesheet Dispatch	Not selected

Enforce 'end of week' rate dates in Rate Schemes

Rate Scheme start and end dates are not used in timesheet calculation by the day but by the week the day falls in. Therefore, days set in the Start/End date columns for each rate will default to the beginning or end of the week the date entered falls in, depending on which rate scheme start or end column is used.

This change affects Maintenance - Temps Setup Rate Scheme (expand) and Vacancy/Placement - Rates.

Time x 1.5	Hours	13.52	13.52	16.00	16.00	15.50 %		
WEnd & PH	Hours	12.00	12.00	17.00	17.00	29.41 %	27/12/1999	05/01/2020
Standard	Hours	7.50	7.50	10.20	10.20	26.47 %	27/12/1999	05/01/2020
Time x 1.5	Hours	13.52	13.52	16.00	16.00	15.50 %	27/12/1999	05/01/2020

Extra columns to Rate Schemes

Three additional columns can now be added to rate schemes (not for invoice processing) to allow agencies to record additional information as required by their clients.



Beyond ExtraCode3 three extra columns can be added ExtraRate 1, 2 and 3 with soft headers for Terminology.

Requires System Administrator setup.

Auditing of individual rates on Vacancy and Placement

Changes to rates in Vacancies and Placements are now audited with a list of all the previous and changed rates.

Extend Pay_Employee.TaxCode field to 6 characters long

To accommodate the new 6-character Scottish tax codes which are prefixed with an S the Pay_Employee TaxCode has been extended to 6 characters.

NI/Tax Details	NI Letter: A, Tax Code: S1200L, Week 1 Indicator: Yes
NI Letter	A
Tax Code	S1200L
Week 1	<input checked="" type="checkbox"/>
Title for Payroll	

Shift fill view - button to Add Unavailability etc.

When a user is on the last page of the Fill Shifts wizard and contacts a candidate for their availability they can add their unavailability via a new button on the top right of the view.

Expand	Process	SMS / Email	<input type="checkbox"/> Hide Duplicate and Filled Shifts	Auto-fill This Temp	Auto-fill All	Send Pack
Previously used employees highlighted (Yellow for same Company, Green for same Vacancy)						
						Enter Unavailability

Client field for 'IsPortal'

Companies can now be identified as 'Managed by Portal' via a tick box in Company - Miscellaneous. This setting will be useful for reporting purposes.

Questionnaire	Days Credit	14
Notes	Private Sector Outside IR35	<input type="checkbox"/>
Extra Notes	Managed by Portal	<input type="checkbox"/>
Group Tree	Invoice Frequency	Immediate
	Company Reg. No	

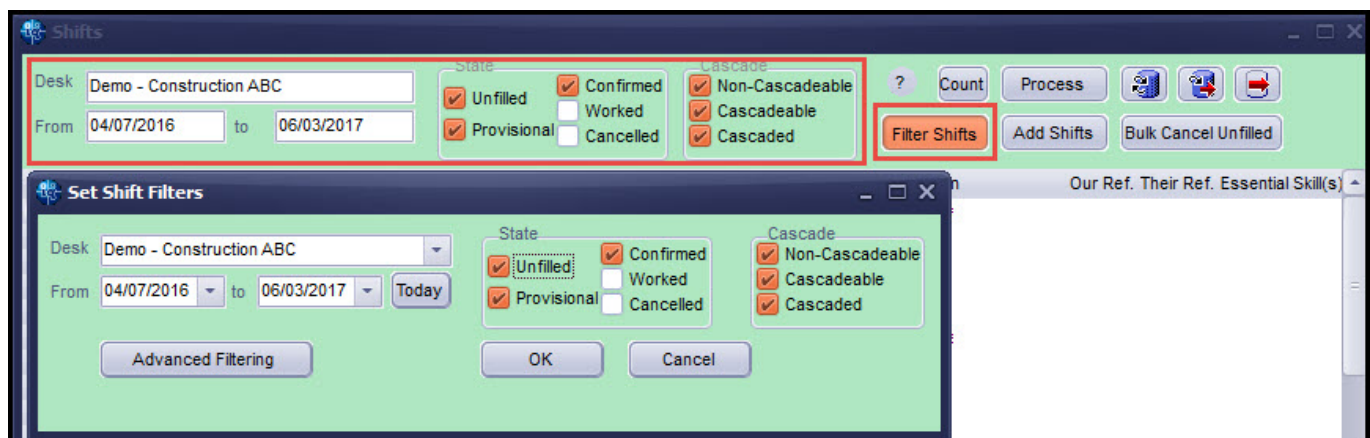
Shift view - use dialogue to reset filters, to avoid refresh after every tweak.

Shift View Filtering has been changed to accommodate speed issues affecting large lists of shifts

When filtering in Temp Desk Shift view large numbers of shifts can cause speed issues as each button click will cause the database to filter on each change individually. Therefore, an additional view has been added which opens when a user clicks Filter or attempts to click anywhere on the top left of the



Shift view (hidden button).



The new window is a duplicate of the top part of the Shift view but allows the user to select all their filtering choices before filtering the list of shifts.

Completed Timesheet shows the sum of Units (Paid and Charged) and Amount (Paid and Charged)

In the payband view of a provision timesheet wizard the hour totals are displayed to help when a lot of lines are displayed. This feature has been extended to completed timesheets.

Totals :- Units Paid - 55.00 Units Charged - 55.00 Amount Paid - 687.50 Amount Charged - 1002.65													
Line No.	Description	Unit	Units Paid	Pay Rate	Amount Paid	Units Charged	Charge Rate	Amount Charged	Grade	AWR?	Ltd?	Shift	Payroll Flag
1	Standard	Hours	11.00	12.50	137.50	11.00	18.23	200.53	N	N		04/07/2016	ST01
2	Standard	Hours	11.00	12.50	137.50	11.00	18.23	200.53	N	N		05/07/2016	ST01
3	Standard	Hours	11.00	12.50	137.50	11.00	18.23	200.53	N	N		06/07/2016	ST01
4	Standard	Hours	11.00	12.50	137.50	11.00	18.23	200.53	N	N		07/07/2016	ST01
5	Standard	Hours	11.00	12.50	137.50	11.00	18.23	200.53	N	N		08/07/2016	ST01

Placements - to show Margin calculations in Rates as in Vacancy

Margin calculations in rates have been extended to placement rates. The Margin is displayed by clicking the 'Show Margin' tick box.

Rate Scheme: General worker - Day, OT & Sund <input type="checkbox"/> Show Historic Rates <input checked="" type="checkbox"/> Show Margin <input type="button" value="Revert to Vacancy Rates"/>									
Description	Per	Pay Rate	Total Cost	Charge Rate	Margin	Start Date	End Date	Grade	AWR? Ltd?
Standard	Hours	9.50	10.72	11.91	10.03 %				N
Time x 1.5	Hours	14.25	16.07	18.00	10.70 %				N

The Margin calculation works in the same way as the Vacancy rate margin calculation.

Requires System Administrator setup.

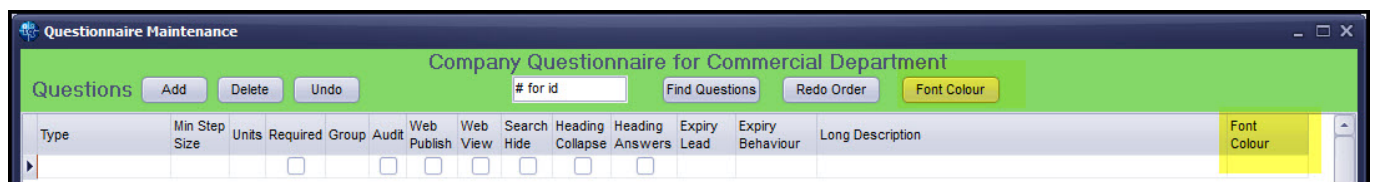


System Administrator

Questionnaire Additions

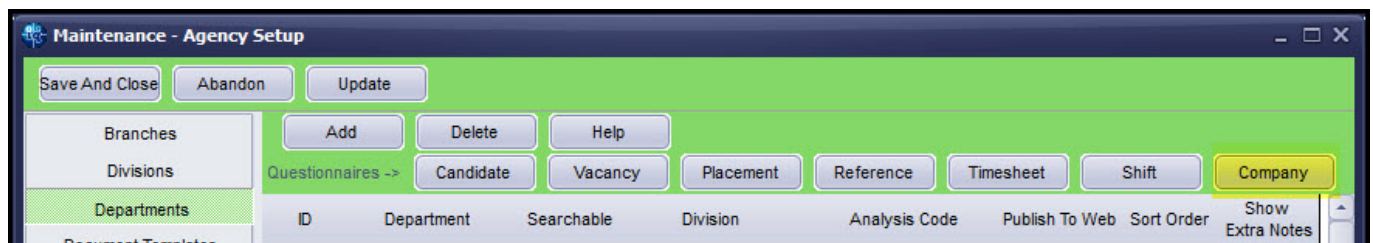
Questions, Choices and Sub-choices in Questionnaires (General and Departmental) have been extended to 60 characters allowing more flexibility when adding questions.

The display of questionnaire questions can be customised by setting different font colours. Use the font colour button to set colours in the far right hand column.



Departmental Questionnaire for Companies

Departmental questionnaires have been added for Companies. The location and functionality of the questionnaires is the same as other departmental questionnaires. (Agency Setup - Departments). The Company departmental questions are displayed in Company - Questionnaire above the General questions and in the top left view. Users see only the Questions for their own Department.



In Maintenance - User the visibility of Company departmental questions can be switched on or off for each user.



Ivan Baldwin

Save and Close Abandon Update No Password Delete Help Reports

Roles	Name	Ivan Baldwin	Branch	North West
Layout Settings	Keyname	BALDWIN IVAN	Division	Infrastructure
Questionnaire	Login Name	IVAN	Default Department	Industrial
Division Access	Job Title	Consultant	Default Tempdesk	Industrial Drivers
Department Maintenance	E-Mail Address	IVAN.BALDWIN@IQX.CO.UK	Analysis Code	C2
Popup Escalations	Short ID	IB	Nominal Segment (main	
Broadbean	Template for New Users	<input checked="" type="checkbox"/>	Report View Level	2000
Audit Trail	Not In Use	<input type="checkbox"/>	Report Print Level	2000
Own Audit Trail				

Search

Group	Setting	Activate	Expires	Notes
USER	Hide Company Department Questionnaire	<input type="checkbox"/>		
USER	Hide Company Documents	<input type="checkbox"/>		

Departmentalised questions can now be searched using Company Selector - Search criteria.

Embedding Images in Notifications

Images can be embedded in notification in two ways

Adding {APP_PHOTO} to the relevant Notification template will pull through the candidate image stored in Person - Photo.

Template

```
<p>{COM_SALUTATION}</p>
<p>{COM_COMPANYNAME}</p>
<p>{APP_NAME} will be working as {VAC_POSITION}</p>
<p>{APP_PHOTO}</p>

<table>
{SHN_BEGIN}
<tr>
<td>{SHN_DATE DDDD dd/mm/yyyy}</td>
<td>{SHN_FROM} - {SHN_TO}</td>
</tr>
{SHN_END}
</table>
```

OK Cancel

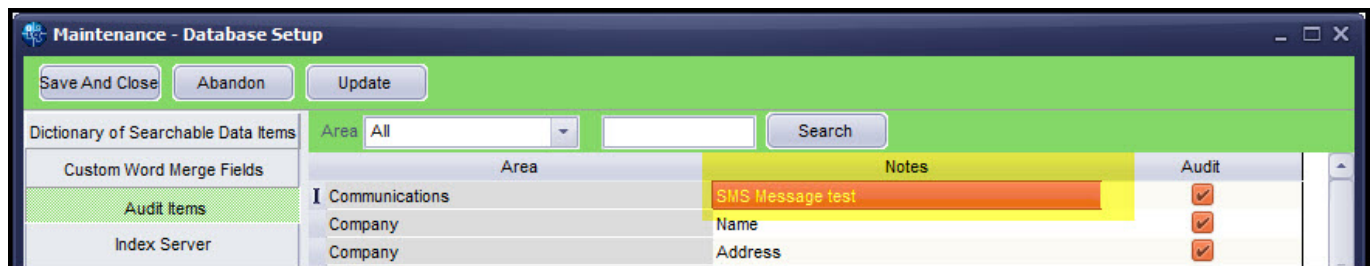
Adding to the relevant Notification template will pull through an image from a folder.



Note Person - Photo will only store jpg images. However, adding a file from a folder location will allow other image formats to be used.

Clarify Audit Terminology

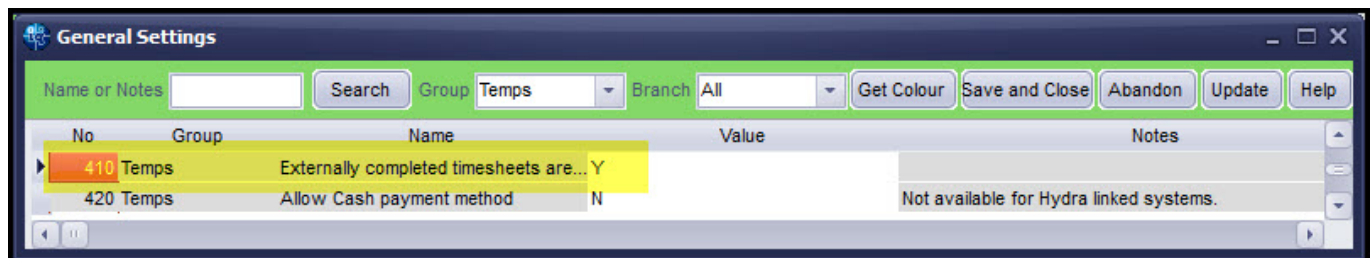
In Database Setup - Audit Items, it is now possible to edit the Notes field to allow clarification of audit terminology.



Protect Timesheet Images before PDF process

A new feature which allows agencies to store images, created by the standard image linker, on the blobstore has been provided. This can protect linked images from unauthorised renaming or removal avoiding problems when creating invoice pdfs due to incorrectly named or missing timesheet images.

Switch Temps 1080 activates storing the linked images on the blobstore. Previously linked images will not be stored in the blobstore but will still be accessible in existing folders.



Extra images activated by General Settings - Accounts 410 will still be stored in folders and not in the blobstore.

Person Based image linked images will still be stored in external folders and not on the blobstore.

Direct Link from IQX to Broadbean

A new way of accessing Broadbean directly from within the IQX Broadbean view has been added.

A new Rank button has been added in the Broadbean IQX view and is activated by inserting a Broadbean Token Key in Maintenance - User - Broadbean. This key is obtained directly from Broadbean.



The screenshot shows the 'Candidates' tab in the IQX interface. At the top, there are buttons for 'View CV', 'Import and Add to Short List', and 'Retrieve'. Below these are filters for 'Rank' (set to 'All') and 'Rejection' (set to 'All'). There are also buttons for 'Reject', 'Candidate', and 'Rank' (highlighted in yellow). Below the buttons is a table with columns: Name, Forename, Surname, Salutation, Address, Street, Town, Postcode, Email, Phone, and a partially visible 'R' column.

Once a vacancy has been posted to Broadbean and candidates have applied for a position Users have passwordless access the vacancy in Broadbean via the Rank button. Then users can pull through candidates into the Broadbean IQX view.

The Broadbean ID (Applitrak ID) for each vacancy is visible at the far right of the IQX Broadbean Advert tab.

The screenshot shows a table with two columns: 'Check Date' and 'Applitrak ID'. The 'Check Date' column contains the value '10/02/2017 17:00'. The 'Applitrak ID' column contains the value '39557'.

Check Date	Applitrak ID
10/02/2017 17:00	39557

If a User has Maintenance rights they will also be able to see the xmlformat (of CV) and filename.

The screenshot shows a table with two columns: 'XML Format' and 'File Name'. There are two rows of data.

XML Format	File Name
(Memo)	1486746171-19299-HHarman.doc
(Memo)	1486746130-22730-my_cv.pdf

Broadbean - Auto retrieval of all applications

A new General Setting has been added to exploit the ability to download Broadbean applications to the Broadbean view, in the past x days. This is not to import or shortlist the candidates, just retrieve their application into the Broadbean IQX form.

An xml job will import current candidate applications from Broadbean into the IQX Broadbean view based on the number of days offset from the current date.

Settings - 644 allows the limiting of number of offset days the xml job will search (default 90 days).

The screenshot shows the 'General Settings' window. At the top, there is a search bar with 'offset' entered. Below the search bar is a table with columns: No, Group, Name, Value, and Notes. The table has one row highlighted in yellow.

No	Group	Name	Value	Notes
644	Settings	Broadbean Candidate Offset Days	90	Only download candidates whose application time is

The job will populate the relevant Broadbean vacancy/candidate view (pulling down the CV, email body and xml format), for review by the User.



This job does not automatically import applicants into person records.

Contact IQX for the Import xml.

Method of identifying Private Sector Companies re IR35

A new tick box had been added to both versions of Company - Miscellaneous 'Private Sector outside IR35' to enable agencies to identify which companies are Exempt from the Public Company IR35 regulations.

Questionnaire	Days Credit	14
Notes	Private Sector Outside IR35	<input type="checkbox"/>
Extra Notes	Managed by Portal	<input type="checkbox"/>
	Invoice Frequency	Immediate
Group Tree	Company Reg. No	

Also, a User role has been added Can override Public Sector client. This enables a user to edit 'Override IR35 Public Sector' tick boxes in Placement - top right window and Vacancy - Misc. Payroll transfer will need to be amended to use these settings according to the end payroll requirement.

Web Publish	Payroll Co.	1
	Analysis Code	
Miscellaneous	Cascade Time	
	Cascade Level	0
Location Map	External Price List	
Shift Templates	Send Shifts To Payroll	<input type="checkbox"/>
	Override IR35 Public Sector	<input type="checkbox"/>
Vacancy Limits	Timesheet Dispatch	Not selected

Dynamic Schemes - apply dates to overrides

Extra functionality has been added to Rate Scheme maintenance form to allow Users to do controlled updates of over-rides, on demand.

In Maintenance - Temps Setup - Rate Schemes - Rate Scheme there is a static warning message 'There may be Vacancy and Placement over-rides' serving as a warning to Users that if rate start and end dates are changed it will impact on over-rides.



Temp Rate Scheme - General Skilled Rates

Save and Close Abandon Update Delete Duplicate Help

Rates Description General Skilled Rates

Audit Trail Dynamic ☒

Department

Division

Client Charge Code

Employer NI % 13.80

Holiday Allowance % 12.07

Discount %

Rate Script Shift WorkPattern 37.5

Extra Code 1

Extra Code 2

Extra Code 3

Extra Code 4

Add Delete Show Historic Rates Note: There may be Vacancy or Placement over-rides Manage over-rides

Band [All] Grade [All] AWR? [All] Ltd? [All]

There is a button which will search for open-ended (no end date) over-ride rates in both placements and vacancies relating to the currently selected rates in the scheme (using the filter combos) and report the numbers.

Confirm

Open-ended over-rides (no end date) for selected rates:
Vacancy: 27
Placement: 27
Set end dates?

Yes No

If there are any open ended over-ride rates an end date can be added to them.

Enforce 'end of week' rate dates in Rate Schemes

Rate Scheme start and end dates are not used in timesheet calculation by the day but by the week the day falls in. Therefore, days set in the Start/End date columns for each rate will default to the beginning or end of the week the date entered falls in, depending on which rate scheme start or end column is used.

Time x 1.5	Hours	13.52	13.52	16.00	16.00	15.50 %	27/12/1999	05/01/2020
W'End & PH	Hours	12.00	12.00	17.00	17.00	29.41 %	27/12/1999	05/01/2020
Standard	Hours	7.50	7.50	10.20	10.20	26.47 %	27/12/1999	05/01/2020
Time x 1.5	Hours	13.52	13.52	16.00	16.00	15.50 %	27/12/1999	05/01/2020

This change affects Maintenance - Temps Setup Rate Scheme (expand) and Vacancy/Placement - Rates



Extra columns to Rate Schemes

Three additional columns can now be added to rate schemes (not for invoice processing) to allow agencies to record additional information as required by their clients.

The three extra columns can be added ExtraRate 1, 2 and 3 with soft headers for Terminology.

No	Group	Name	Value	Notes
1303	Switchable Fields	Caption for Speciality Rate Filter		Will not appear if caption blank
1305	Switchable Fields	Caption for Extra Temp Rate 1	Test 1	Will not appear if caption blank
1306	Switchable Fields	Caption for Extra Temp Rate 2	Test 2	Will not appear if caption blank
1307	Switchable Fields	Caption for Extra Temp Rate 3	Test 3	Will not appear if caption blank
1310	Switchable Fields	Show Previous Progress State	N	If 1 show previous progress state, if not rejected.

The extra columns are only added via adding captions into Switchable Fields 1305-7. They are visible in Vacancy, Placement and Temp Setup - Rate Schemes.

A db function will be required to deliver the relevant rates for reporting, respecting date ranges and over-rides.

Please contact IQX for support with using ExtraRate information in reports.

Auditing of individual rates on Vacancy and Placement

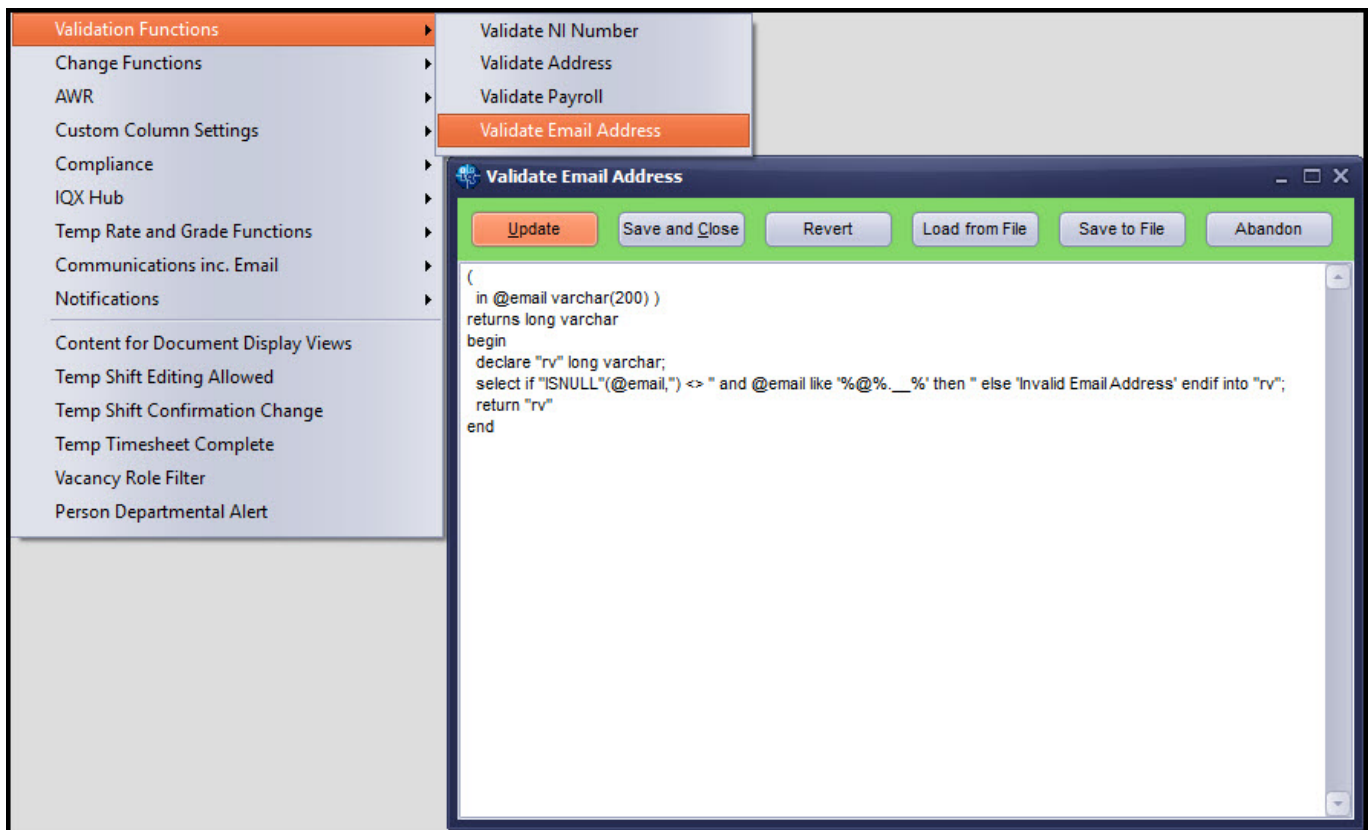
Changes to rates in Vacancies and Placements are now audited with a list of all the previous and changed rates.

Login Name	Old Values	New Values	RecordID	Connection ID
IVAN	Standard Pay 18 Charg...	Standard Pay 36 Charg...	XX1G84VS050120140...	6

Description	Per	Pay Rate	Total Cost	Charge Rate	Discounted Charge	Margin	Week Start Date	Week End Date	Grade	AWR?	Ltd?
Standard	Hours	36.00	45.91	26.50	26.50	-73.26 %				N	

New Validation script for email addresses

A new validation script has been added to Maintenance - Database Functions - Validation Functions - Validate Email Addresses.



This function allows agencies to create validation scripts to avoid illegal characters being saved into IQX

For example, a script could be used to avoid mistakes where @ are missed out of emails.

The script validates emails in: Person - Get in Touch, Person - Details, IQXWeb - email address, Company contact - email and Company Contact - Email.

Extend Pay_Employee.TaxCode field to 6 characters long

To accommodate the new 6-character Scottish tax codes which are prefixed with an S the Pay_Employee TaxCode has been extended to 6 characters.

NI/Tax Details	NI Letter: A, Tax Code: S1200L, Week 1 Indicator: Yes
NI Letter	A
Tax Code	S1200L
Week 1	<input checked="" type="checkbox"/>
Title for Payroll	

Contact IQX for SQL to update , in advance, older versions of IQX with this change.

Shift fill view - button to Add Unavailability etc

When a user is on the last page of the Fill Shifts wizard and contacts a candidate for their availability they can add their unavailability via a new button on the top right of the view.



Expand	Process	SMS / Email	<input type="checkbox"/> Hide Duplicate and Filled Shifts	Auto-fill This Temp	Auto-fill All	Send Pack
Previously used employees highlighted (Yellow for same Company, Green for same Vacancy)						Enter Unavailability

Client field for 'IsPortal'

Companies can now be identified as 'Managed by Portal' via a tick box in Company - Miscellaneous. This setting will be useful for reporting purposes.

Questionnaire	Days Credit	14
Notes	Private Sector Outside IR35	<input type="checkbox"/>
Extra Notes	Managed by Portal	<input type="checkbox"/>
Group Tree	Invoice Frequency	Immediate
	Company Reg. No	

Shift view - use dialogue to reset filters, to avoid refresh after every tweak

Shift View Filtering has been changed to accommodate speed issues affecting large lists of shifts

When filtering in Temp Desk Shift view large numbers of shifts can cause speed issues as each button click will cause the database to filter on each change individually. Therefore, an additional view has been added which opens when a user clicks Filter or attempts to click anywhere on the top left of the Shift view (hidden button).

The screenshot shows the 'Shifts' window with a red box highlighting the filter controls. Below it, the 'Set Shift Filters' dialog is open, which is a duplicate of the filter controls in the Shifts window. The dialog includes fields for Desk, From, To, and Today, and checkboxes for State and Cascade. The 'Filter Shifts' button is also highlighted in the Shifts window.

The new window is a duplicate of the top part of the Shift view but allows the user to select all their filtering choices before filtering the list of shifts.

Completed Timesheet shows the sum of Units (Paid and Charged) and Amount (Paid and Charged)

In the payband view of a provision timesheet wizard the hour totals are displayed to help when a lot of lines are displayed. This feature has been extended to completed timesheets.



Totals :- Units Paid - 55.00 Units Charged - 55.00 Amount Paid - 687.50 Amount Charged - 1002.65														
Line No.	Description	Unit	Units Paid	Pay Rate	Amount Paid	Units Charged	Charge Rate	Amount Charged	Grade	AWR?	Ltd?	Shift	Payroll Flag	Comments
1	Standard	Hours	11.00	12.50	137.50	11.00	18.23	200.53	N	N		04/07/2016	ST01	
2	Standard	Hours	11.00	12.50	137.50	11.00	18.23	200.53	N	N		05/07/2016	ST01	
3	Standard	Hours	11.00	12.50	137.50	11.00	18.23	200.53	N	N		06/07/2016	ST01	
4	Standard	Hours	11.00	12.50	137.50	11.00	18.23	200.53	N	N		07/07/2016	ST01	
5	Standard	Hours	11.00	12.50	137.50	11.00	18.23	200.53	N	N		08/07/2016	ST01	

Placements - to show Margin calculations in Rates as in Vacancy

Margin calculations in rates have been extended to placement rates. The Margin is displayed by clicking the 'Show Margin' tick box.

Invoices	Rate Scheme	General worker - Day, OT & Sund		<input type="checkbox"/> Show Historic Rates	<input checked="" type="checkbox"/> Show Margin	Revert to Vacancy Rates	
Questionnaire	Description	Per	Pay Rate	Total Cost	Charge Rate	Margin	Start Date
Notes	Standard	Hours	9.50	10.72	11.91	10.03 %	
Contacts	Time x 1.5	Hours	14.25	16.07	18.00	10.70 %	
Documents							

This box defaults to unticked unless General Settings - Temps 1100 'Show rate margin on placement by default' is set to Y.

General Settings					
Name or Notes	Search	Group	Temps	Branch	All
				Get Colour	Save and Close
				Abandon	Update
				Help	
No	Group	Name	Value	Notes	
1100	Temps	Show rate margin on placement by ...	Y		

The Margin calculation works in the same way as the vacancy rate margin calculation.

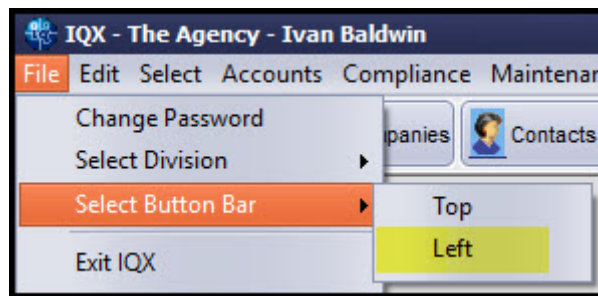
E-tips - creating shifts from emails

Shifts can be added to a vacancy from emails via the new Etips system.

Contact IQX for further information.

Alternative IQX button bar - left position and new icons

An alternative IQX button view has been set up in IQX to give the User more flexibility arranging their view of IQX. A User will be able to switch the button bar between the existing horizontal top view and the new vertical left view, according to personal preference.

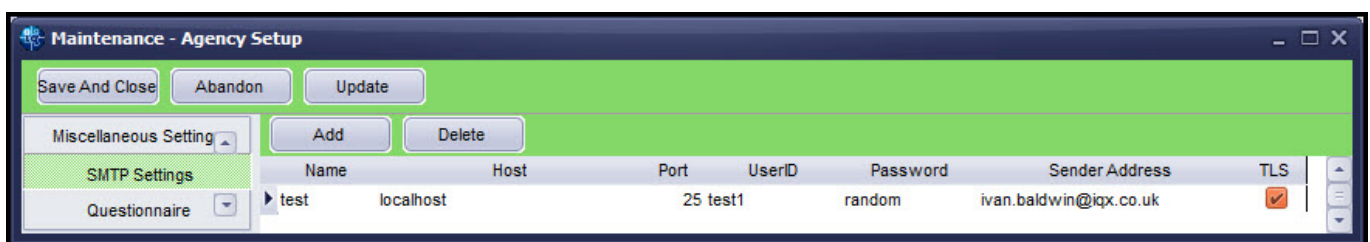


The button images need to be imported. Contact IQX support for instructions on setting up this feature.



Facility to edit additional SMTP profiles in IQX

Additional SMTP profiles can be stored in IQX allowing for the use of Jobs and other Hub activities that differ from the single DEFAULT profile currently maintained in Maintenance - IQXNet Setup.



The SMTP profiles can be added, edited and deleted.

The DEFAULT profile is still available in Maintenance - IQXNet Setup.

Add a programmable button to placement

A programmable button can be added to the Placement view. This button can be used to run a script or a job, or open a form or a web page.

The button caption and associated script can be added in Maintenance General Settings - Programmable Buttons (10 and 11) - Placement Caption and Placement Script.



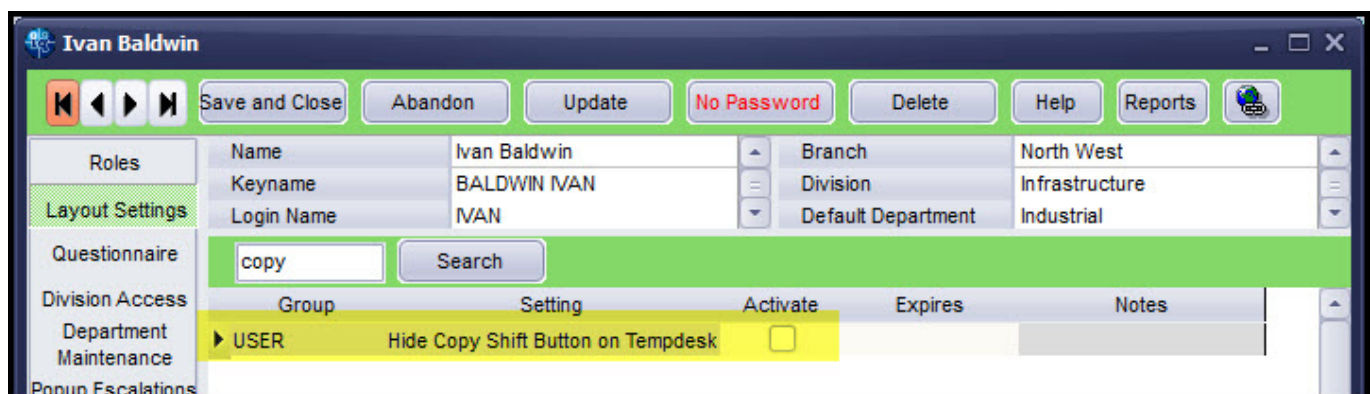
When a caption and script is entered, a button will appear on the top right of the Placement record.



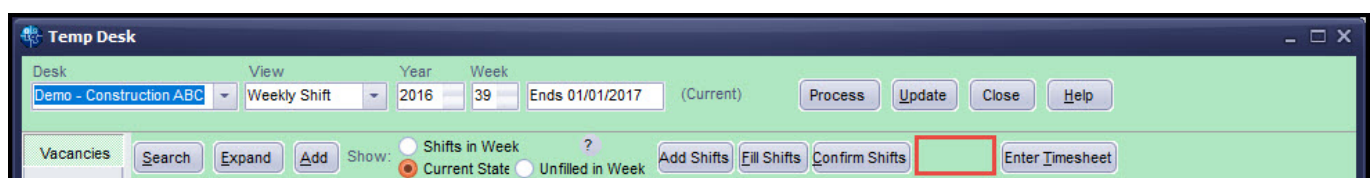
Limit the ability to Copy shifts to a User Role

The visibility of the Copy Shifts button in Temp Desk - Vacancy and Temp Desk - Vacancy Shifts can be controlled with a User setting.

The Copy Shift button is hidden by clicking the 'Hide Copy Shift Button on Tempdesk' tick box in Maintenance - Users - Layout Settings.



Clicking of the 'Copy Shifts' button is automatically audited and visible in Maintenance - Database Diagnostics - Audit Trail.



Custom User role for SQL non-modal only

A new user role setting has been added which allows access to the Non-Modal SQL Tool for users without Technical access.



Ivan Baldwin

Save and Close Abandon Update No Password Delete Help Reports

Roles: Name: Ivan Baldwin, Branch: North West, Keyname: BALDWIN IVAN, Division: Infrastructure, Login Name: IVAN, Default Department: Industrial

Layout Settings: Questionnaire: Search

Division Access: Department: Maintenance

Group	Setting	Activate	Expires	Notes
USER	Show SQL Tool (Non-Modal)	<input checked="" type="checkbox"/>		

With the User role 'Tech Support' unticked and User Layout setting 'Show SQL Tool non-Modal' - ticked Users can select SQL Tool (Non-Modal) in the Maintenance and Select drop down menus.

Select	Accounts	Compliance	Maintenance	W
	Desk Top		F4	
	Companies		F5	
	Contacts		Ctrl+F5	
	People		F6	
	Vacancies		F7	
	Temp Desk		F8	
	Shifts		Ctrl+F8	
	Make Contact Event		F2	
	Make Diary Appointment		F3	
	Make Diary Reminder		F12	
	Make Chat			
	Progress			
	Placements			
	Contact Events			
	Chat			
	Invoices		Ctrl+F11	
	Direct Invoice		Alt+F11	
	Direct Self Bill Invoice		Shift+F11	
	Timesheets		F11	
	Miscellaneous Reports			
	Dashboard			
	Recent Records		Ctrl+F2	
	SQL Tool (non-modal)			

Payroll Transfers - visibility linked to Accounts role instead of Technical



Support

The means of controlling the Payroll Transfers view, has been switched from Technical Support to Accounts. This change more accurately reflects the role with a greater involvement in financial matters.

With Accounts rights on and Switchable Views 540, (or Accord linked), on users can see the Payroll Transfers sidebar menu item in Person records. This information is view only.

From:

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Last update: **2018/03/15 15:02**

