



# Release 2.16.2

**Note:** 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.

## New Features

### Users

#### New Person Wizard - filtering of Temp Desks

In order to avoid long lists Temp Desks are now filtered according to the Users' Division Access as set in Users – Division Access and also in File - Select Division.

This feature will require System Administrator set up.

The screenshot shows the IQX user management interface for a user named Joe Bloggs. The left sidebar contains a menu with options: Roles, Layout Settings, Questionnaire, Division Access (highlighted), Department Maintenance, Popup Escalations, Broadbean, Audit Trail, and Own Audit Trail. The main form has a top bar with buttons: Save and Close, Abandon, Update, No Password, and Delete. The form fields include: Name (Joe Bloggs), Keyname (BLOGGS JOE), Login Name (JBLOGGS), Job Title (Demo Tester), E-Mail Address (joe.bloggs@iqx.co.uk), Short ID (JB), Template for New Users (checkbox), and Not in Use (checkbox). On the right, there is a list of divisions: Branch, Division, Default Department, Default Tempdesk, Analysis Code, Nominal Segment (main), Report View Level, and Report Print Level. Below this, there is a section for Division Access with tabs: All, Own, and Selected. The Selected tab is active, showing a list of divisions with checkboxes: BR Derby (checked), BR Leicester (unchecked), BR Nottingham (unchecked), and Legal Recruitment (unchecked).

In addition, Defunct Temp Desks can now be hidden when completing the New Person Wizard and in the Temp Desk drop down menu.

Temp Desk

Desk

View

Year

Derby Industrial

Industrial Drivers

Leicester Ind Shifts

Leicester Industrial

All

Weekly Shift

Weekly Contract

Weekly Shift

Weekly Shift

Weekly Contract

2014

Vacancy

Shifts

Please tick any Temp Desks in which the Candidate will be registered

Temp Desk	In Pool
Derby Industrial	<input type="checkbox"/>
Leicester Ind Shifts	<input type="checkbox"/>
Leicester Industrial	<input type="checkbox"/>
Industrial Drivers	<input type="checkbox"/>

This is activated in by your System Administrator.

## Email body text with mailmerge letter attachment

It is now possible to add email body text when sending letters as an attachment using the mailmerge function.

To use this function Person - Select candidates - Mail Merge - Select Merge Document - Open - Select Signatory where a choice is available - OK - Select which records will be used. - OK - Review each letter using the video buttons to transit between letters. - Email Where Available.



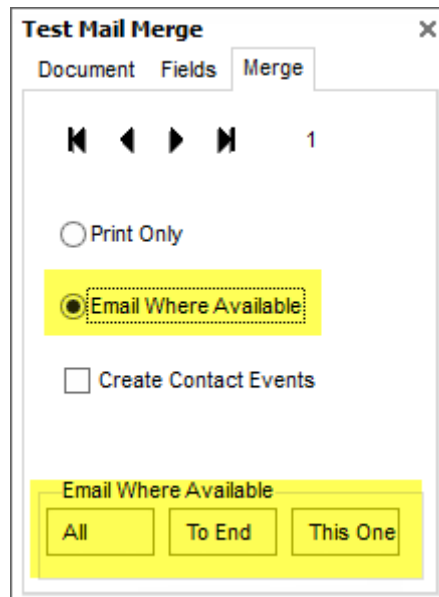
The 'Test Mail Merge' dialog box has three tabs: 'Document', 'Fields', and 'Merge'. The 'Merge' tab is selected and highlighted in yellow. It contains navigation buttons (back, forward, first, last) and a page indicator '1'. There are three radio buttons: 'Print Only' (selected), 'Email Where Available' (highlighted in yellow), and 'Create Contact Events'. At the bottom, there is a 'Print Out' section with three buttons: 'All', 'To End', and 'This One'.

Select Attachment. Without this the template and Attachment Message boxes will not be available. Select the required template (Note if Agency Setup - Branding is enabled this will show all templates from within the 'MAILMERGEATTACHMENT' Brand.). Insert the attachment message. Click OK.

The 'E-Mail' dialog box shows the 'Subject' field with the text 'Test'. The 'Attachment Message Text' section has a 'Template' dropdown menu highlighted in yellow, which is currently open, showing 'TEMPNOTIFICATION TEST1'. Below this is a large text area for 'Insert your message here'. The 'Attachments' section has 'CV(s)' checked and 'Letter as' set to 'Attachment' (highlighted in yellow). There are buttons for 'File', 'Document', and 'Remove'. At the bottom, a red box highlights the 'Print Selection : 1 out of 4 without Email Address' section, which contains three radio buttons: 'Send or Print All' (selected), 'Send those with Address (ignore others)', and 'Print those without Address (ignore others)'. The 'Include IQX Signature' checkbox is checked. 'Ok' and 'Cancel' buttons are at the bottom right.



Email Where Available at the bottom of the next window. Choose from All/To End/This One. Clicking one of these buttons will send the emails and attachments.

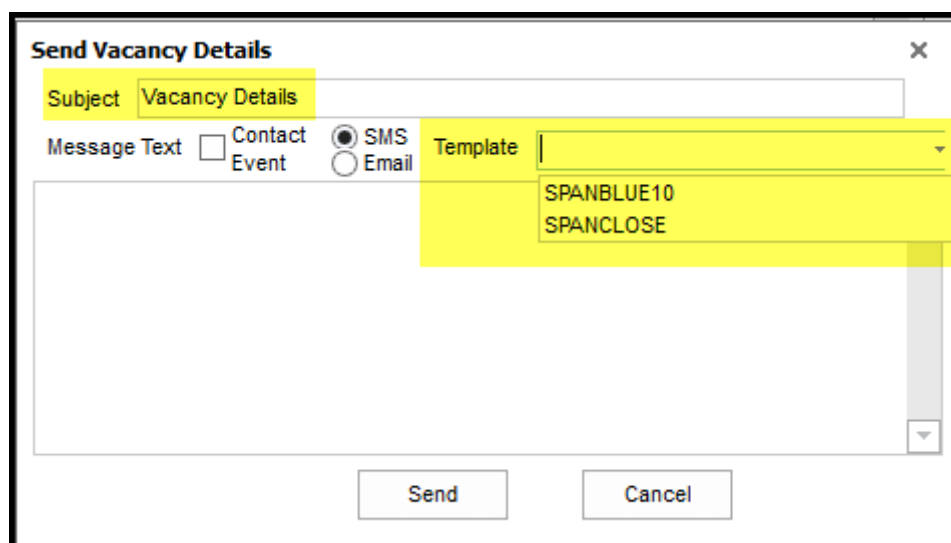


## Send Details - Modifiable Email subject

If set up to send details from Vacancy - Shortlist and Person - Progress the subject line can now be modified and defaults to Vacancy Details.

A template drop down menu has also been added allowing the use of templates when sending details.

In Person - Progress or Vacancy - Short List select a record and click Send Details.



If Agency Setup Branding is enabled and there is a brand called 'PROGRESSSENDDetails', the



template descriptions will appear in the drop down list. If no Branding for PROGRESSSENDDetails not set up, then the boilerplate 'contact event' descriptions will appear. If required 'PROGRESSSENDDetails' will require System Administrator set up.

If SMS is ticked the subject is ignored and does not count towards the character count

## Broadbean candidate CV retrieval by ranking

Broadbean functionality has been extended in IQX to allow Users to retrieve CVs according to Broadbean's ranking. Users can retrieve CVs ranked Suitable, Unsuitable, Maybe Suitable, Unranked or All. This ranking uses the same naming convention as the Broadbean site.

Once a vacancy has been posted via a job board the Broadbean icon will have a red tick in it. Select this icon. In the next window select Candidates - Retrieve Candidates and select the ranking. Results which have been ranked by Broadbean will be displayed. The rank of each result is shown in the rank column.

See IQX for full details on setting up and using Broadbean.

**Broadbean : Temp Vacancy: Operator for 3I Group PLC**

Delete Advert | Advert Check | New Advert | Update | Close | **Please Wait....**

Advert - Checkdate :

LocationPath	Industry	Create Time	Close Time	Description	Reference	Title	Type	Salary Ben
	Building & Construc	26/01/2016 1		This is not a	Test1	Operator	Contract	Plentiful training

Channels | **Candidates**

View CV | Import Candidate and add to shortlist | **Retrieve Candidates** | Candidate

Name	Forename	Surname	Salutation	Address	Street	Town	Postcode	Email	Phone	App. Time	Rank	Channel Name	Imported	ShortListed
Brittany Spiers							2 7JR	ivan@iqx	0115 981 4675	26/01/2016 1	Unranked	Jobs Cabinet (Test Board	<input type="checkbox"/>	<input type="checkbox"/>
Karen Howes							12 8J	jbloggs@	0208 675 1234	26/01/2016 1	Unranked	Broadbean Test Board	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Candidate Rank**

Rank

All  
**Unranked**  
UnSuitable  
MaybeSuitable  
Suitable

## New Candidate - Duplicate Check

When registering a new candidate IQX checks for and suggests possible duplicate candidates at the end of the first window and once the New Person wizard is completed. It checks name (> 70%), date of birth, email and postcode. It is now possible to modify the duplicate candidate check to ignore



duplicate postcodes which will result in more possible duplicates.

This will require System Administrator set up.

## Web Referencing

Web Referencing has now been extended to allow Agency Setup Branding to be applied to emailed Reference Requests.

This functionality relies on set up by IQX staff in conjunction with System Administrators. An updated User Guide is available here. [User Guide](#)

## Accounts

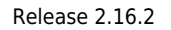
### New switchable vat rates

It is now possible to add 5% and 10% VAT rates to the company form where the application of these rates are permitted by HMRC.

This feature will require System Administrator set up.

Once set up the additional rates can be seen in Company - Miscellaneous - VAT Status drop down menu.

Questionnaire	Credit Limit	
Notes	Days Credit	14
Extra Notes	Group Timesheets on Invoice	One invoice for each Timesheet
Group Tree	Invoice Frequency	Weekly
	Company Reg. No.	
	VAT Number	
Miscellaneous	Invoice This Record Address	<input checked="" type="checkbox"/>
Accounts	Invoice Address	36 George Street, EDINBURGH
Documents	Currency	
	On Stop	<input type="checkbox"/>
Temp Details	E-Timesheets	<input type="checkbox"/>
Location Map	VAT Status	Standard
Company	Not Ltd. Company	Standard
WebSite	ERNI on Invoice	Exempt
Cascade Rules	Timesheet Contact	5 %
	Invoice E-mail	10 %
Audit Tr	Statement E-mail	



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



If Branding is enabled and there is a brand called 'PROGRESSSENDDetails', the template descriptions will appear in the drop down list. If no Branding for PROGRESSSENDDetails not set up, then the boilerplate 'contact event' descriptions will appear. If required 'PROGRESSSENDDetails' will require System Administrator set up.

## New Candidate - Duplicate Check

When registering a new candidate it is now possible to modify the duplicate candidate check to ignore duplicate postcodes, which will result in more possible duplicates.

This is set up in General Settings - Settings - 1920 - Ignore Postcode in Duplicate Check - Y.

The screenshot shows the 'General Settings' window with the 'Settings' group selected. The table below shows the configuration for '1920 Settings'.

No	Group	Name	Value	Notes
1920	Settings	Ignore Postcode in Duplicate Check	Y	Person / Company Duplicate Check. Default includes

## New switchable vat rates

It is now possible to add 5% and 10% VAT rates to the company form where the application of these rates are permitted by HMRC.

To ensure the additional rate are visible Maintenance - General Settings - Accounts - No 60 should be set to N.

The screenshot shows the 'General Settings' window with the 'Accounts' group selected. The table below shows the configuration for '60 Accounts'.

No	Group	Name	Value	Notes
60	Accounts	Restrict Company Miscellaneous to ...	N	Restricts access to the Miscellaneous view on the

and Extra VAT Types for Accounts should be set to Y.

The screenshot shows the 'General Settings' window with the 'Accounts' group selected. The table below shows the configuration for '450 Accounts'.

No	Group	Name	Value	Notes
450	Accounts	Extra Vat Types for Accounts	Y	If "Y", adds in the extra vat types to the picklist



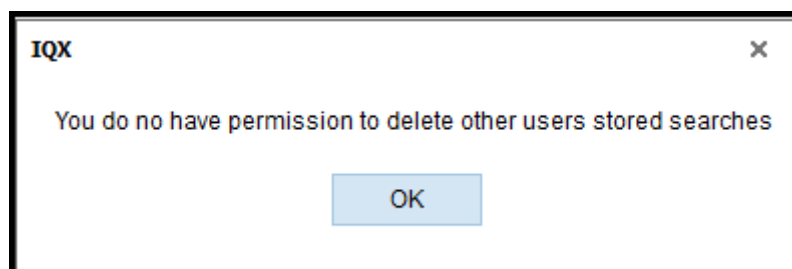
Once set up the additional rates can be seen in Company - Miscellaneous - VAT Status - pick list.

Questionnaire	Credit Limit	
Notes	Days Credit	14
Extra Notes	Group Timesheets on Invoice	One invoice for each Timeshee
Group Tree	Invoice Frequency	Weekly
	Company Reg. No.	
Miscellaneous	VAT Number	
Accounts	Invoice This Record Address	<input checked="" type="checkbox"/>
Documents	Invoice Address	36 George Street, EDINBURGH
Temp Details	Currency	
	On Stop	<input type="checkbox"/>
Location Map	E-Timesheets	<input type="checkbox"/>
Company	VAT Status	Standard
WebSite	Not Ltd. Company	Standard
Cascade Rules	ERNI on Invoice	Exempt
Audit Tr	Timesheet Contact	5 %
	Invoice E-mail	10 %
	Statement E-mail	

Contact IQX for help in modifying the function - Invoice VAT Code for Timesheet Line to complete the setup of these additional rates.

## Deletion of Stored Selections and Searches

Managers can now restrict stored selection and search deletion to the users' own stored selections and searches. If a User attempts to delete searches created by other users the following warning will appear.



Only Users with Manager rights will be able to delete any stored searches and selections via the Manager switch in Maintenance - Users Roles - General - Manager.



**Joe Bloggs**

Save and Close Abandon Update No Password Delete Help Reports

Roles	Name	Joe Bloggs	Branch	Leicester Office
Layout Settings	Keyname	BLOGGS JOE	Division	Legal Recruitment
Questionnaire	Login Name	JBLOGGS	Default Department	Construction
Division Access	Job Title	Demo Tester	Default Tempdesk	Demo - Construction ABC
Department Maintenance	E-Mail Address	joe.bloggs@iqx.co.uk	Analysis Code	
Popup Escalations	Short ID	JB	Nominal Segment (main	
Broadbean	Template for New Users	<input type="checkbox"/>	Report View Level	999
Audit Trail	Not In Use	<input type="checkbox"/>	Report Print Level	999
Own Audit Trail	Role Group	All	manager	Search

Group	Role	Search Criteria Group	Assigned	Expires	Notes
GENERAL	Manager		<input checked="" type="checkbox"/>		Is able to over-ride selected validation checks

Deletion of stored searches and selections is now audited.

**Joe Bloggs**

Save and Close Abandon Update No Password Delete Help Reports

Roles	Name	Joe Bloggs	Branch	Leicester Office	
Layout Settings	Keyname	BLOGGS JOE	Division	Legal Recruitment	
Questionnaire	Login Name	JBLOGGS	Default Department	Construction	
Division Access	Job Title	Demo Tester	Default Tempdesk	Demo - Construction ABC	
Department Maintenance	E-Mail Address	joe.bloggs@iqx.co.uk	Analysis Code		
Popup Escalations	Short ID	JB	Nominal Segment (main		
Broadbean	Template for New Users	<input type="checkbox"/>	Report View Level	999	
Audit Trail	Not In Use	<input type="checkbox"/>	Report Print Level	999	
Own Audit Trail	Date	09/02/2016	to	09/02/2016	Count

Description	When	Old Values	New Values	Connection ID
Delete Candidate Stored Search Global Vacancy Default Construction	09/02/2016 16:51			29

**Database Diagnostics**

IQX licences in use: 1 Refresh Close

Engine Window: Current Previous Failed Starting 09/02/2016

Audit Trail: Expand User Disconnect User Message To Users Export / Archive Count

Serial No.	Login Name	Login Time	Logout Time	Failure Reason	Network Address	Connection Name	Connection ID	Client Machine	Details
2168	jbloggs	09/02/2016 12:50			192.168.0.160	IQX - jbloggs	29	TEST1	IQX Login Details - Login Name: jbloggs, 2

## Web Referencing

Web Referencing has now been extended to allow Branding to be applied to emailed Reference Requests.

This functionality relies on set up by IQX staff in conjunction with System Administrators. For reference a Setup guide has been included. [Setup Guide](#)

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