



Release 2.18.2

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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User

The following new features require System Administrator Setup in order for them to work. These include:

- New role for adding and maintaining Users.
- Ability to restrict access to specific document types.

Contact Event - Email sent 'log'

A new view 'Email Log' has been added to Contact Events.

When an email is sent from a Contact Event a full list of recipients, a list of attachments (if any) and the date and time when the information was passed to the email system is now recorded in the new view Email Log.

If the email system has cleared down old emails it will show what attachments were sent and to whom.

The screenshot shows the 'Contact Event 10 Group PLC, Leccy Taser' window. The 'Email Log' view is selected in the left-hand menu. The main area displays the following details:

Company	10 Group PLC, Leccy Taser	
Made By	IVAN	
Date	06/02/2018	
Time	12:06	
Type	Client Update	
Summary	This is another test	
Outcome		
Callback		
Callback Time		
Priority	5	
Created By	IVAN	

On the right, contact details for 'Leccy' and '10 Group PLC' are listed:

Leccy	E-mail	leccy@iqx.co.uk
10 Group PLC	Phone	01632 356 739
	E-mail	lnaaya_carlson@iqx.co.uk
	Web Site	www.iqx.co.uk

At the bottom, the 'Email Log' table shows the following entry:

Sent	Recipients	Attachments
06/02/2018 12:07	leccy@iqx.co.uk	Report.PDF; Quick Notes.one; blank criteria.xml



New role for adding and maintaining Users

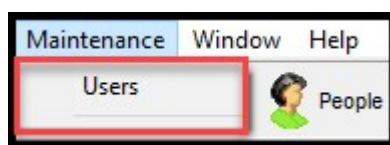
This feature requires System Administrator Setup

A new role has been added for Users which allows Users without full Maintenance rights to add and maintain Users and leavers.

The role is accessed via Maintenance - Users.

Users with User Maintenance rights will not be able to maintain their own User rights.

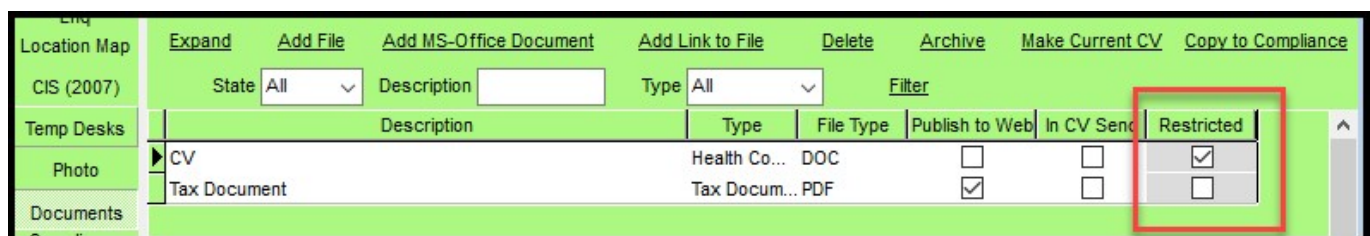
Users with Full Maintenance rights will still be able to maintain Users.



Ability to restrict access to specific document types

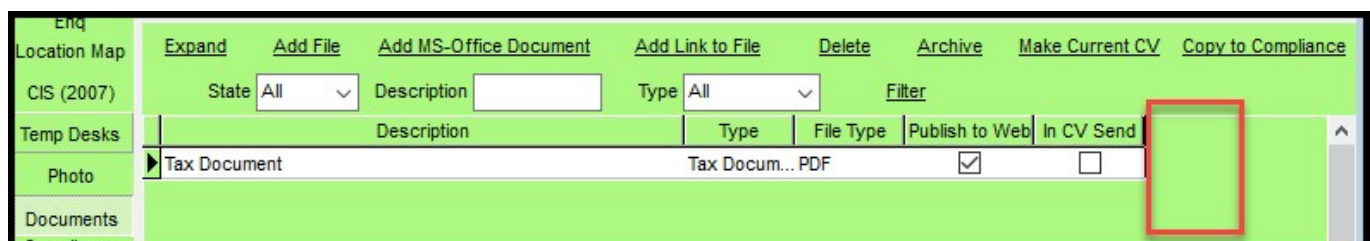
This feature requires System Administrator Setup

If set up by your system administrator a new column will appear in Person Documents, Person - Compliance Documents, Company - Documents, Vacancy - Documents, Progress - Documents, Placement - Documents. E.g.



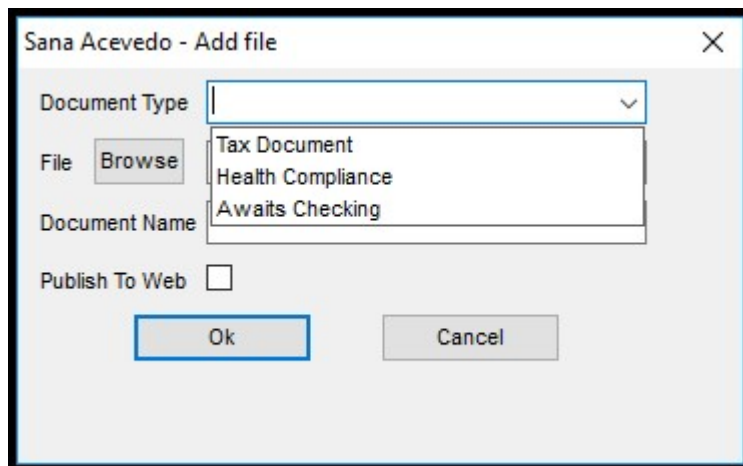
This column will indicate which documents are restricted.

Users without access to restricted documents will not see this column E.g.

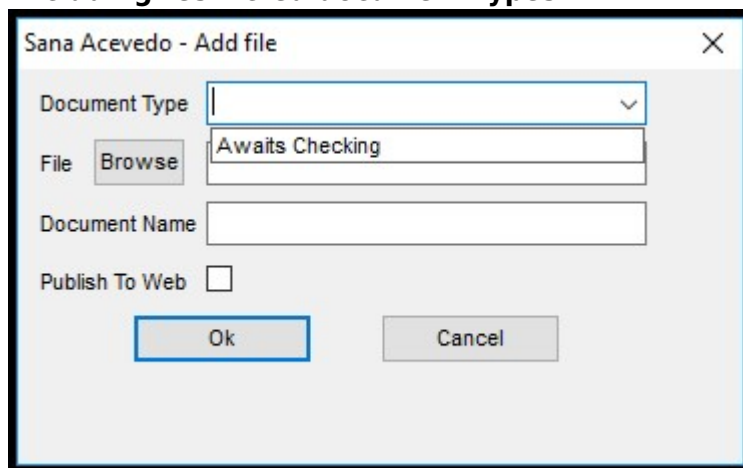


In addition, restricted document types will not be available for selection when adding documents in the above locations. E.g.

Including restricted document types



Excluding restricted document types



System Administrator

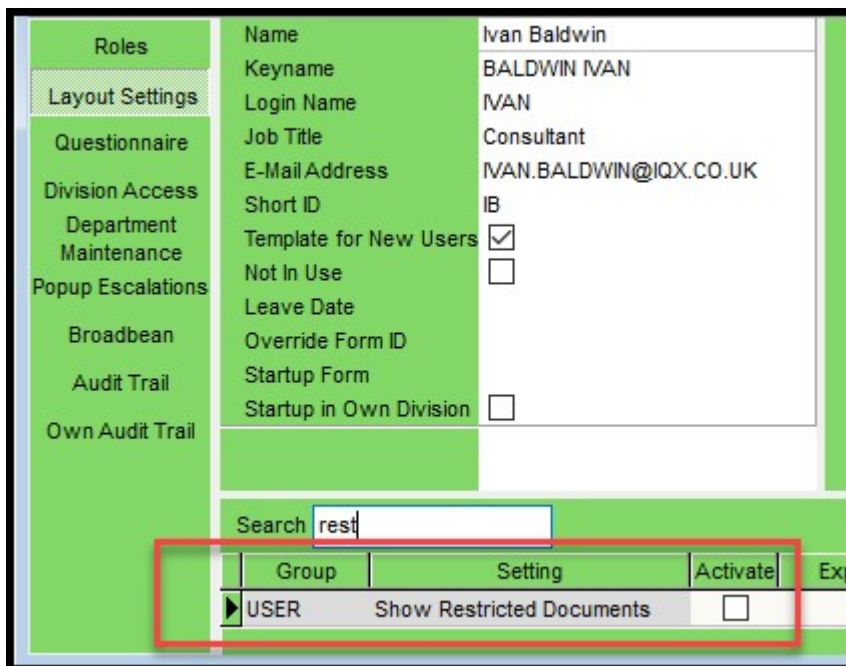
New role for adding and maintaining Users

To set up a User without Full Maintenance rights to maintain users go to Maintenance - User - Roles and tick User Maintenance.

MAINTENA... Shmt Template Maintenance	<input checked="" type="checkbox"/>	Can edit temp Shmt Templates
MAINTENA... User Maintenance	<input checked="" type="checkbox"/>	Can edit users without full maintenance rights
MAINTENA... Report Maintenance	<input checked="" type="checkbox"/>	Can edit Report Layouts

Ability to restrict access to specific document types

To restrict access to document type Users need to have Maintenance - User - Layout Settings - Show Restricted Documents unticked.

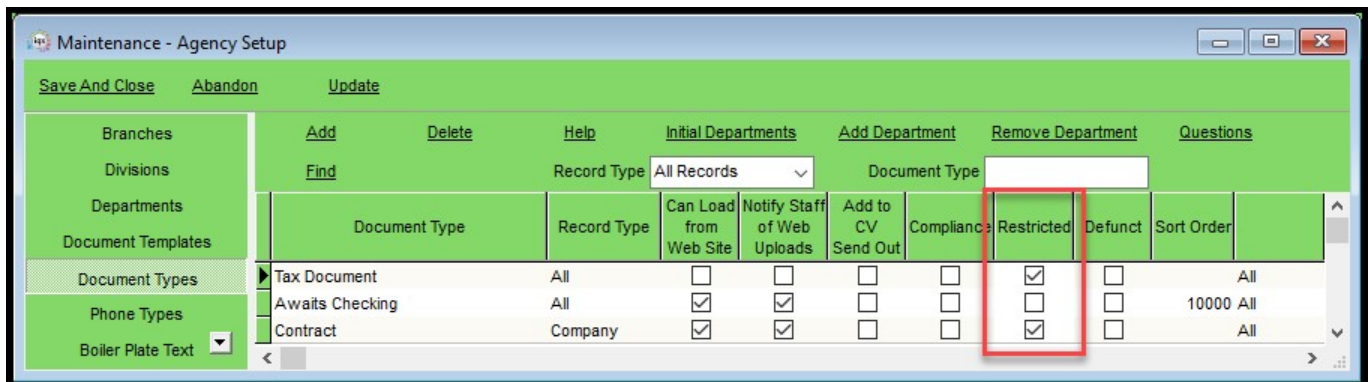


Roles	Name	Ivan Baldwin
Layout Settings	Keyname	BALDWIN IVAN
Questionnaire	Login Name	IVAN
Division Access	Job Title	Consultant
Department Maintenance	E-Mail Address	IVAN.BALDWIN@IQX.CO.UK
Popup Escalations	Short ID	IB
Broadbean	Template for New Users	<input checked="" type="checkbox"/>
Audit Trail	Not In Use	<input type="checkbox"/>
Own Audit Trail	Leave Date	
	Override Form ID	
	Startup Form	
	Startup in Own Division	<input type="checkbox"/>

Search: rest

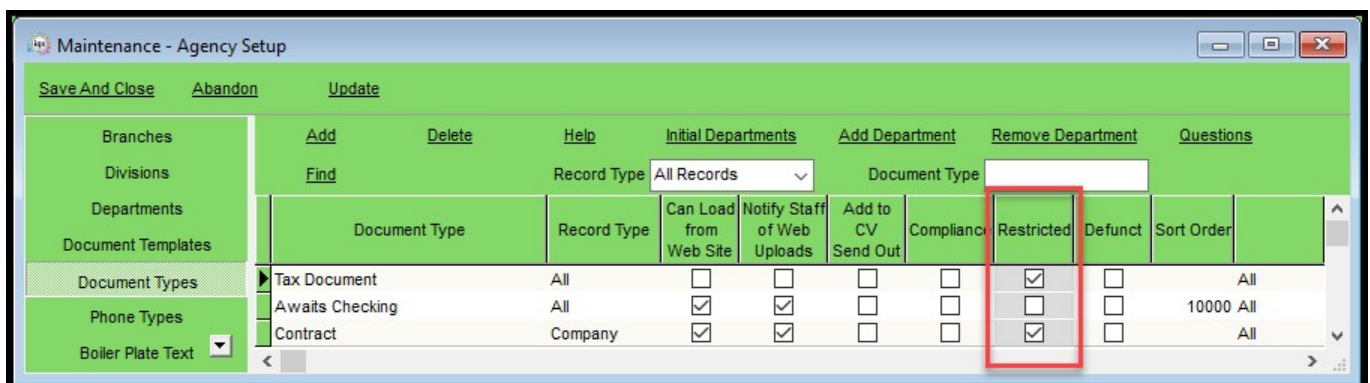
Group	Setting	Activate	Exp
USER	Show Restricted Documents	<input checked="" type="checkbox"/>	

Document Types can be restricted in Agency Setup - Document Types and the Restricted columnn ticked.



Document Type	Record Type	Can Load from Web Site	Notify Staff of Web Uploads	Add to CV Send Out	Compliance	Restricted	Defunct	Sort Order
Tax Document	All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	All
Awaits Checking	All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10000 All
Contract	Company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	All

Users without access to restricted documents but access to Agency Setup will see the restricted column (greyed out) but will be unable to edit it.



Document Type	Record Type	Can Load from Web Site	Notify Staff of Web Uploads	Add to CV Send Out	Compliance	Restricted	Defunct	Sort Order
Tax Document	All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	All
Awaits Checking	All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10000 All
Contract	Company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	All

Set the max number of windows that can be open

You can now set the maximum number of windows that a user can have open at any one time, this is



set per user in Maintenance - Users - Form Limit:

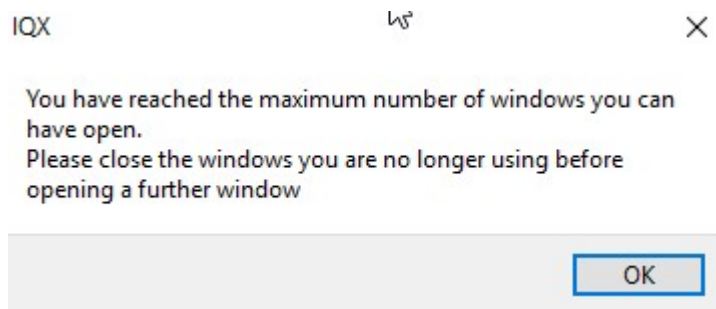
The screenshot shows the 'Hazel' user maintenance window. The 'Form Limit' field is highlighted with a blue border and contains the value '25'. The window has a menu bar with 'Save and Close', 'Abandon', 'Update', 'No Password', 'Delete', 'Help', and 'Reports'. The left sidebar shows 'Roles' and 'Layout Settings'. The main area displays user details for 'Hazel'.

Field	Value
Name	Hazel
Keyname	HAZEL
Login Name	HAZEL
Job Title	SYSTEM SUPPORT
E-Mail Address	hazel.thorburn@iqx.co.uk
Short ID	15

Field	Value
Form Limit	25

Leaving the Form Limit at 0 will allow users to open an unlimited number of windows.

Users will receive the following message if they reach this maximum number of windows.



Switch for Source enforcement

It is now possible to make Source a required field on the New Person Wizard. Set this in General Settings - group of Settings - number 3080.

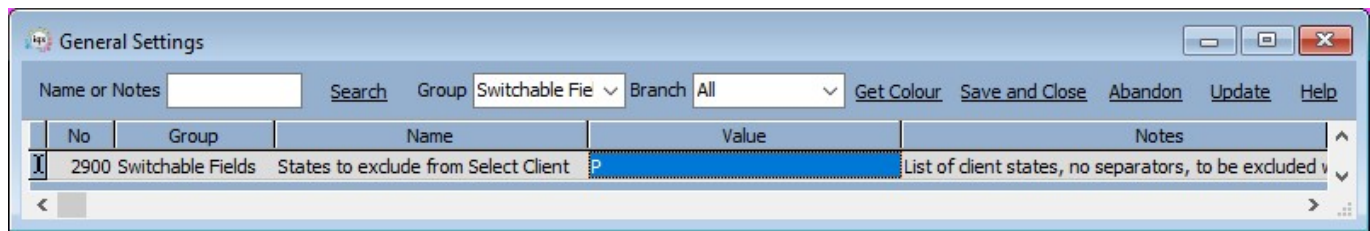
The screenshot shows the 'General Settings' window. The 'Force Source on New Person Entry' switch is set to 'Y'. The window has a menu bar with 'Search', 'Group', 'Settings', 'Branch', 'All', 'Get Colour', 'Save and Close', 'Abandon', 'Update', and 'Help'. The left sidebar shows 'Name or Notes'.

No	Group	Name	Value	Notes
1	3080 Settings	Force Source on New Person Entry	Y	

Setting this will not allow users to add a new candidate without completing the source question.

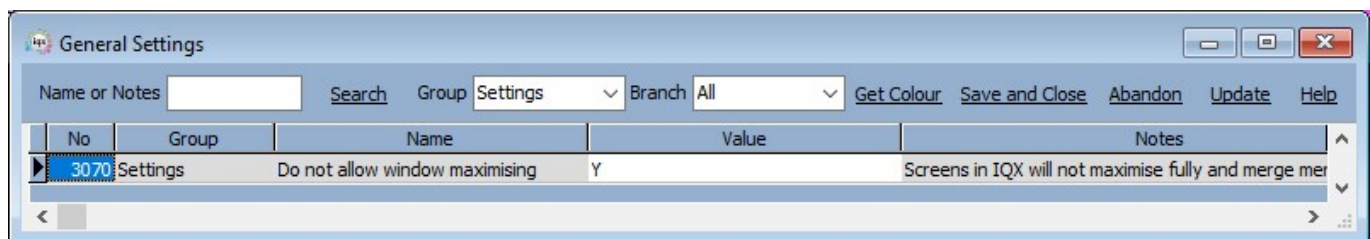
New switch on 'Select Company' to filter certain states

It is possible to limit the company states that are returned when adding History to a Person record. Set the states to be excluded from the returned companies in Maintenance - General Settings - group of Switchable Fields - number 2900.



Maximising windows now only affects the window in focus

Maintenance - General Settings - group of Settings 3070 if set to Y will ensure that when the maximise button is selected on a window only that window maximises and the other windows remain the same size.



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Last update: **2018/02/23 10:55**

