

Release 2.20.6

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.

- Features
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FEATURES

Personalise the Side Bar of IQX Records

Users with the Modify Own Screen Layout right can now reorder the tabs on the left hand side of a record so you can put the views that are most relevant to you to the top of the list. In the Modify Screen view there is a new Ordering button which opens a form that allows you set the sort order for the different views, the lower the number the higher the view will appear on the side bar. Views that have been re-ordered show in red font.

CIS Cards	Home Phone				
	Day Phone	Temp role		-	
Temp Desks	Mobile	Reset to Standard Fit		aa	5
Photo	E-mail	Reset to Standard	er		3)
Compliance	Social Media	NOTE - Some items may not be	visible to you,		
Documents	Address	have a firmer sinkly refer to	- Maria - Francisco - Kan		
Compliance Detail	Source	because of user rights, roles o	r lux configuration		
Score Details	Consultant	The PERSON form WILL close v	when you press sav	•	
Score Details	Compliance U				
Checklist	Registered	tem	OID	New	_
Equal Opps	Last Updated	Documents	330	5	
	Ordering N	Contact Events	10	10	
AutoMatch Config		Compliance Status	20	20	
AutoMatch Preferences		Get in Touch	30	30	
	Hide Person /	Diary	40	40	
Modify Screen	Hide Person	Shifts	50	50	
Appointments	Hide Person /	Availability	70	70	
Expenses Claims	Hide Person /	Requirements	80	80	
	Hide Person /	CV	90	90	
Stored Selections	Hide Person /	Questionnaire	100	100	
Mailer I ista	Hide Person	Notes	110	110	
Perm	Hide Person	notes .	110	110	

Placements 'Active' in date range option on the selector

You can now easily access all active placements in a specific date range on the selector without having to search, simply by clicking the new Active button on the placement selector.

	iqx		
2024/05/24 (Release 2.20.6
Select Place	ments	- 🗆 X	
SHELLEY	- Start Placed Active Date 27/07/2020 - to 31/07/2020 - Perm Temp Both Close Help		
Details	Expand Company Applicant Vacancy Count ? Update		
Filter	Process Applicants Process Companies Process Contacts Process Vacancies Filter Map		
Stored Filters	Consultant Company Start Date End Date Applicant Job Title Temp Pay Charge	Plac -	

Work pattern has been moved on a placement record

Work pattern has been moved on a placement record to the top of the right-hand section and the summary now reflects the working days that have been selected.

SS MACADORS CONTRACTOR	Man
Help 🗿 🛃 📑	
Leave Date	
	MT_TF 08:30 8 hours
Department	Nursing
Consultant	SHELLEY
Our Ref.	3715
Concurrent or Shifts	
Override IR35 Public Sector	
Cleat has approved condidate	
Help 🕄 😫 🖶	
Leave Date	-
OWork Pattern	MT_TF 08:30 8 hours
Monday	
Tuesday	
Wednesday	
Thursday	Image: A state of the state
Friday	V
Saturday	
Sunday	•
	(-

Send Confirmations direct from Placement

To improve the process of sending out Placement information there is now a **Notify** button on placements so you can go straight to sending Confirmation emails, based on templates, with attachments to the client and candidate.

H 4 Þ H 💽	3 💷 🖬 🤘	Vacancy Reports D	elete Unwith	ndraw Notify Help	333	
Details	Applicant	Bridget Jones		Start Date	03/05/2016	
	Company	ABC Contract Services Aber, Cl	aire Dys 🚥 😑	Leave Date	03/05/2016	
Invoicing	Job Title	BCL Test		Department	Nursing	
Contact Events	Client Department			Consultant	SCOTTM	
	PO Number			Our Ref.	3442	
Accounts	Contract			Override IR35 Public Si	ector	
Staged Invoices	Placement Date	14/02/2020		Salary		
Questionnaire	Override Invoice L			Fee	.00	
Questoniare	Invoice Number		(11) *	WithdrawReason	Withdrawn By Client	- 50
Notes	tem	Value				
Contacts	Invoice Description		Iridget Jones eng	gaged as BCL Test on 03/	5/20	
Documents	Invoice for the at	in of				
	Overide Invoice E	mai				

2024/05/24 01:56



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When a candidate accepts a role for the first time, in light of the HMRC requirement for all agencies to send key information, this can be automated in the Notify Template.

The templates will need to be set up by your Agency with your System Administrator and the Clients will need the key information documents created.

Temp Desk Expiry Date View Enhancements

Filter on Expiry Date View

For those agencies who have dedicated compliance consultants it is now possible to toggle between person consultant and compliance consultant to quickly identify your candidates for working on.

If expiry date questions apply to only one department, you can toggle off being able to see these to streamline the information consultants see on the expiry dates view.

Expand	Compliance All	•	Working this week	Filter	 Person Consultant Compliance Consultant
	Name	Status	Score %	Compliance Failu	res and Warnings. Expand for Details

Status Change history table

To enable agencies to be able to track status changes a new table has been created to record changes in status of candidates, companies, company sales and vacancies so you can report not only on how many records have a particular state in a date range but how many have been changed to that state in the date range.

Please contact IQX Support on support@iqx.co.uk to discuss any report requirements you have.

ENHANCEMENTS

References can be started from the History view

Users can now start a reference from the History view of a candidate record using the Add Reference button and the reference form will pick up and populate details from the history.

Reference	Last Updated	01/06/2020 1	14:08	U .									
History	Company	Expand	Add Employment	Delete Employment	Make Interna	Withhold	Filter		Process Companies	1	Add Reference	Help	
Progress	Com	pany	Job Title	Temp External	From	To	Salary	Concurrent	By Us	Note		Details (exp	+
	5 Live		HCA Band 2 1453	x	11/05/2020	11/05/2020		~	1				
Company SDS	Alchemy Partne	ers LLP	HCA	M 🗌	29/02/2020	11/11/2019		1	1				
Placements	5 Live		HCA Band 2 Dup	1	18/11/2019	18/11/2019		1	1				



Reference Improvements

For faster reference inputting the reference form now defaults to a reference type, contact event type and your default department. This needs Setup.

Web Referencing Improvements

Ongoing improvements to how you can create and send out online references for referees to fill out.

A tickbox has been included to allow consultants to authorise when a reference should be automatically sent out.

Online Reference	ce New Reference Delete Expand Report Process Reference Filter				? Reference	Refused (Cancel)				
History	Reference	e Department Start Date End Da	te Job Title	Job Title Notes	Referee Name	Organisation	Consultant	Request Created	Approved to Send	Sent to Referee
Progress	P	Nursing	Manager	May 2012 - October 2016	Hazel Thorburn	KQIX.	SHELLEY	27/04/17 11:20		2/04/17 00:
Company SDS		Industrial Nursing	Administrator consultant	Aug 2014 - March 2016	Jessica Jones Alan Strong	Australia Group IQX	SHELLEY	14/04/17 12:43		14/04/17 02:
Placements		Nursing	Consultant		Andy Strong	KLX.		19/02/19 14:53		

It will now be possible to mark references so that no more reminders are sent and to cancel them completely if the referee refuses to provide a reference.

These fields will work in conjunction with automated jobs, please contact IQX Support to discuss your requirements.

Compliance View on a candidate record is now called Score

Compliance View on a candidate record is now called Score to make it more obvious that it is linked to the percentage score in the header

H 4 > H	C			Re	ports	Regis	ter	Delete	Sear	rch		
Score 40%	Help	٩	in	6	bscribed	scribed to Marketing maili						
Temp Photo	±Na	vision me ate		The Agency Catherine Adu Current						Alert Reg. Depar		
Documents Compliance Documents	⊕Av Av	ailable ailable rsonal	From	Female 39					Dept. Que Test numb Unique ID			
Compliance Detail Score Details		y Phon bile	e	···						Test 1 ***P		
Equal Opps	(Complia	nce So	core 40°	%							
Modify Screen				Ite	m					Stat	JS	
Payroll Runs	► Ge	eneral S	Skills					Ok				
	C	earanc	e Stati	us: Wor	kable -	Cleared		Missing				
Warning	DE	BS Expi	ry	м				Missing				
Payroll Transfers	Pa	ssport	Numb	er				Missing				
Stored Selections	Work	k Ok				Ok						

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More Placement lists show the Their Ref/PO Number

There are new columns on the Company Form Placement view, Vacancy Form Placement view, Placement Selector and Desktop Placements so that you can see the placement Their Ref (sometimes renamed PO Number) without having to expand the record.

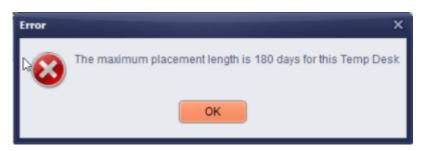
Select Placem	Select Placements											
ALAN	LAN V Start Placed Active Date 25(05/2020 V to 19/08/2020 V Perm Temp Both Close Help											
Detais	Details Expand Company Applicant Vacancy Count ? Update											
Filter	Process Applica	nts Pro	cess Companies	Process Contacts	Process Vacancies Filter		Мар					
Stored Filters	Consultant	Site	Company	Applicant	Job Title	Temp Pay	Tax Method	Charge	Placed	Their Ref.	Our Ref.	^
Reports	ALAN				Sorter	0.00	PAYE	0.00	01/06/2020		500991	

Maximum placement length

It is now possible to set a maximum placement length for temp desk to prevent consultants adding placements that are excessively long.

Turn on in general settings group of temps 1190 (set the value to 1) and then in each individual temp desk set the maximum value for that desk.

If a consultant adds a placement that is for more days than the maximum they will receive the following message:



Users can now see who entered availability and when

Users can now see who entered availability, unavailability or holiday, and when, by right-clicking on the entry in the diary view. This is particularly useful when candidates are using the portal.

In addition, if AWR notes have been added against unavailability with an AWR action these will also show when right-clicking. Note AWR notes can only be added when adding unavailability through the candidate record Availability view or from the Temps view on the temp desk.

Special Arrangement has been renamed Special Rates

The term Special Arrangement, where a Placement can be linked to specific shifts for different rates, has been renamed Special Rates for greater clarity. The functionality remains the same.

	iqx	
2024/05/24 01:56	6/7	Relea
Select Special Rates Ar	rangement Placement	
Existing Special Rates Placement	Ok Cancel	
New	Ok Cancel	
Shifts that you now book for this Person/Re selected Special Rates Arrangement Placement so that rates differ used. This allows Timesheets to use differing	ing from the default placement can be grates for only a selection of shifts,	
without having to remember when completin If you need to link shifts that you have ALR		

Note button on Withholds

The Add to Note button on the withhold views now shows regardless of your roles. Note the rights in relation to editing the note have not changed, ONLY those with manager role can edit a note.

Add Withholds for a candidate from the History view

To save time and double-entry a withhold for a candidate can be entered from the History view of their record.

Reference			Company Expand Add Employ					~ .					-
History		Company	Expand	Add Employment	Dele	te Emp	loyment	Make Internal	Withhold	Filter		Process	Co
		Com	npany	Job Title		Temp	External	From	То	Salary	Concurrent	By Us	^
Progress	Þ	Kembrey PLC		Operator 2nd Bench				04/04/2009	21/04/2009				
Company SDS													

Preview any attachments when sending shift confirmation or interview

When sending notifications to a candidate or a client e.g. shift confirmation or interview details you can now preview any attachments by double-clicking them.

Note - any changes to the attachment need to be made at source as changes made when opened from the notification will not be saved.

Postcode search on Temp Desk

It is now possible to set up a default mileage distance for the postcode search on Temp Desk, Temps so that you don't need to enter the miles every time. This requires System Administrator set up.

Temp Desi	k											
Desk EXALIDER	Vew Weekly Shift	Vear Week ✓ 2020 😩 10 🔮	Ends 07/06/2020	(Current)	Process	Update Co	se Beb	Consultant	ALAN			
Temps	Search Expand Holday Pay	Current Pool	v Mar	Available Un	available On Hold	ay Add Shifts Qo	xok Shifts Confirm :	Shifts Imesheet	Pos	tcode Mies Find		
Placements	Тетр	Otherwise known as	Monday 01/06/2020	Tuesday 02/06/2020	Wednesday 03/06/2020	Thursday 04/06/2020	Friday 05/06/2020	Saturday 06/06/2020	Sunday 07/06/2020	Aiert	Mies	^



A new When Cancelled column on shifts view

A new column has been added to the end of the shifts view on the tempdesk to show users the date and time the shift was cancelled. Much like the When Entered column this column can be ordered newest to oldest and oldest to newest.

When	When
Entered	Cancelled
13/11/2019 15:12	30/04/2020 14:12

Vacancy Expiry Date now shows in the summary

Vacancy Expiry Date now shows in the summary when the Dates drop-down is contracted.

Temp Vacancy: old not auto vacs for 1248				
К < > И СЭ	Reports	Search Delete Help Change Dept. 3		
Contact Events	Company	1248	•	
Contact Events	Contact	ada jones		
Short List	Job Title	Receptionist		
Requirements	No. of Posts	1		
	Their Ref.			
Rates	+Dates	From 07/07/2020 Expires 01/09/2020		

Sending a document pack from a notification

When sending a document pack from a notification if any required documents are not present you will be given a message advising you what is missing and you will be unable to send until the relevant documents are present. If the document is not required then you will be given the option to proceed or cancel and put the documents in place.

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