



Release 2.16.10

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](#)
- [Fixes and Enhancements](#)

Users

Broadbean - Switchable Job description/Vacancy Notes

A new switch has been added to IQX which allows either the Vacancy Job Description or Vacancy Notes to be added to Broadbean advert.

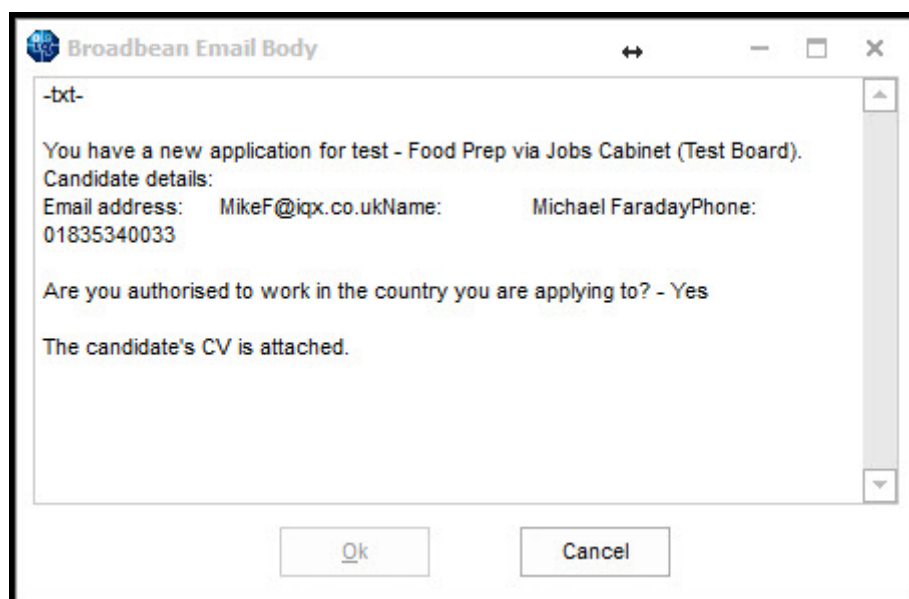
This requires System Administrator set up.

Broadbean hybrid duplicate record check

When importing a candidate from Broadbean the first line of the address and postcode of the candidate is now included. This will allow this information to be compared with possible duplicates. Additional information has been added to the duplicate candidate window showing candidate state and alert information.

Broadbean Email Body Text saved in IQX

The source of the application and email body text is now visible in the Import Candidate and add to Shortlist view. The email body text is stored as a contact event in the candidate record.





This requires System Administrator setup.

Semi-automatic import of Suitable candidates

Where Broadbean has ranked CVs outside IQX, 'Suitable' candidates can now be semi-automatically imported into IQX. When users press the Retrieve Candidates button, the Import Candidate And Add to Shortlist view is automatically called for each new 'Suitable' Candidate.

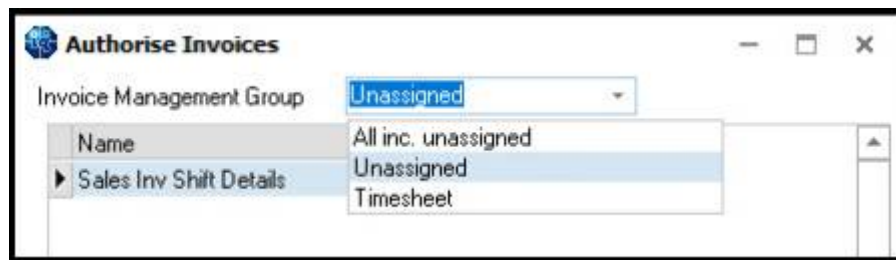
Where there are potential duplicate candidates that are Duplicate Candidate window will be displayed.

A screenshot of a software window titled 'Add Person' with a close button (X) in the top right corner. The window has a light green background and contains several input fields and buttons. The fields are: Surname (Faraday), Forenames (Michael), Full Name (Michael Faraday), Salutation (MICHAEL), Keyname (FARADAY MICHAEL), Email (MikeF@iqx.co.uk), Mobile (empty), Home Phone (01835340033), Work Phone (empty), Address (Gauss Road, Canterbury, Kent, CT9 9ZZ), State (Client), Source (empty), Division (International), and Notes (empty). There are three buttons at the bottom: Ok, Cancel, and Help. A yellow highlight is visible over the Address, State, Source, and Division fields.

This requires System Administrator set up.

Invoice management Group option of unassigned added

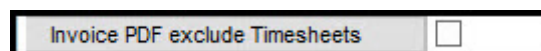
In Invoice Temp Timesheets, Authorise Invoices and Send invoices the option to select and view unassigned timesheets has been added.



Invoicing, attaching timesheets. If general setting is on can turn off at company

When invoicing, the choice of NOT sending linked timesheets with an invoice can be set at global and account level.

The local setting is in Company - Accounts - Invoice PDF exclude timesheets.



Generally, local settings override global settings.

This requires System Administrator setup to activate the global setting.\

Timesheet image linking. Period column added

In Accounts - Timesheet image linking a period column has been added to the display.

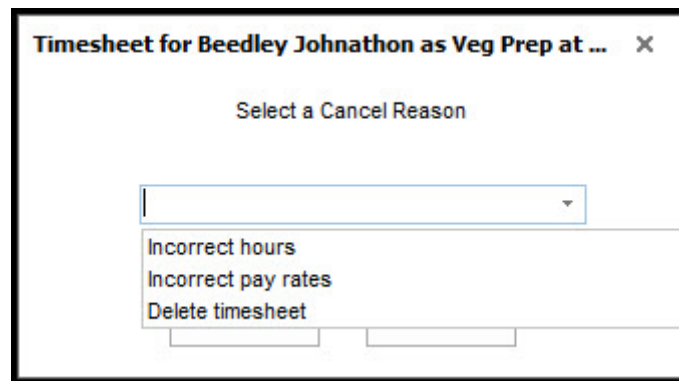
L	Number	Period	Payroll No.	Temp	Company	Position	Comment	ScanPathFilename
U	4604	201622	50171	Paul, Smith	Hawkins Brown Ltd.	Driver		

Timesheet entry from Person. Tempdesk defaults to latest timesheet or a registered desk

The default temp desk has been set to the latest timesheet or the registered desk of the candidate when entering timesheets. This ensures that the timesheet has an appropriate temp desk for that candidate.

Timesheet. Cancel reasons can be used

The timesheet Cancel or Correct process has been enhanced by the inclusion of a drop-down list of previously set up reasons e.g. rates, client, hours, breaks.



The reasons will appear on both the cancelled and amended timesheets.

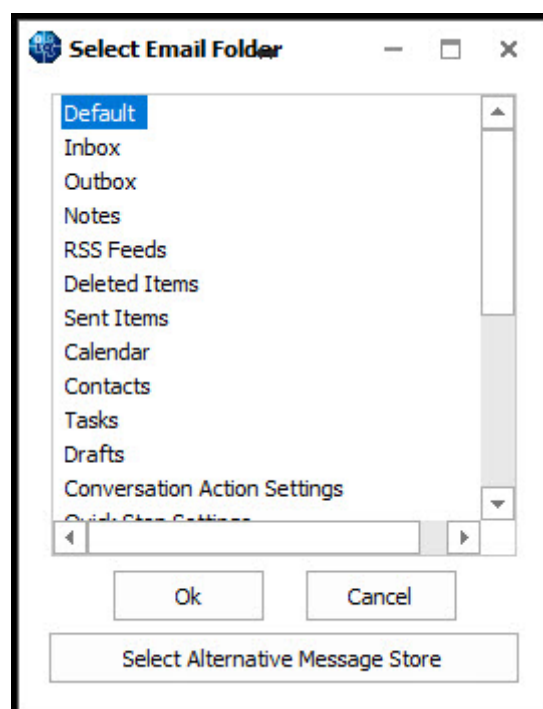
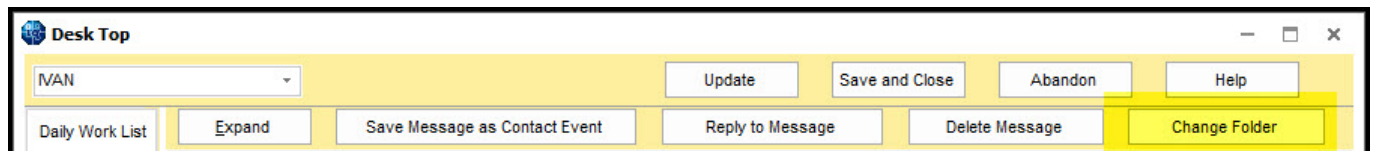
This requires System Administrator set up.

Timesheet, Cancel/Correct. Block contra, improve workflow

Workflow has been improved to silently block the cancelling of contract timesheet.

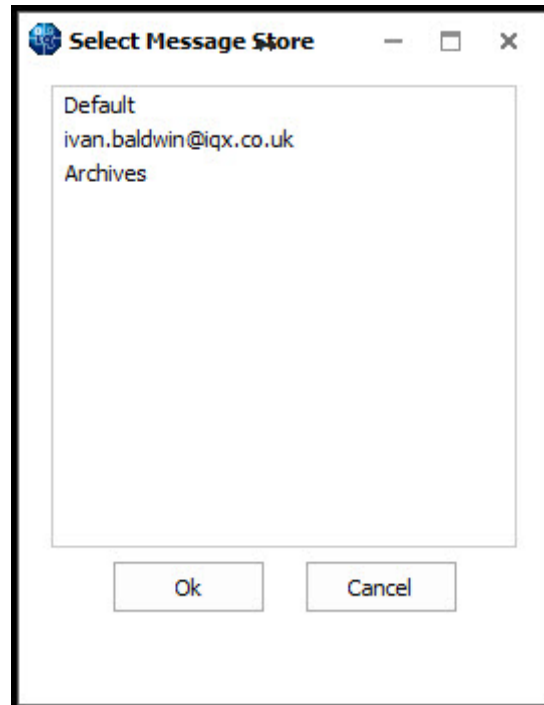
Access message store other than default

In Desktop - Inbox it is possible to change the default message store by clicking change folder and selecting a new message store.





The new selection is immediately displayed. For example, if all IQX emails are set to be stored in a specific folder this folder can be displayed automatically in the users inbox.



Access folder other than Inbox

It is also now possible to select an alternative message store for displaying with IQX inbox. For example, a group email store like admin@IQX.co.uk can be set to populate the user's inbox.

Vacancy. Compliance Questions view added

Compliance questions can now be added to the General and Department Vacancy Questionnaires and grouped using the -200 grouping.



Questionnaire Maintenance

Vacancy Questionnaire for Construction Department

Questions Add Delete Undo # for id Find Questions Redo Order

Order	Question ID	Question Description	Type	Min Step Size	Units	Required	Group	Audit	Web Publish	Web View	Search Hide	Head Coll
5	2	**Health and Safety**	Heading			<input type="checkbox"/>	-200	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	1	CSCS card?	Single Selection			<input type="checkbox"/>	-200	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15	4	CSCS expiry?	Date			<input type="checkbox"/>	-200	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20	3	PSCS Card?	Single Selection			<input type="checkbox"/>	-200	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Choices Add Delete Undo **Sub Choices** Add Delete Undo

Order	Choice ID	Choice Description	Autofill search words (comma separated)	Value
10	_	No	No	
20	Y	Yes	Yes	

Order	Choice ID	Sub Choice Description	Value
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Update Save and Close Abandon Help

Questionnaire Maintenance

Vacancy Questionnaire

Questions Add Delete Undo # for id Find Questions Redo Order

Order	Question ID	Question Description	Type	Min Step Size	Units	Required	Group	Audit	Web Publish	Web View	Search Hide	Head Coll
170	TS1	Evidence of Qualifications provided	Single Selection			<input type="checkbox"/>	-200	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
180	TS2	Qualification Grades	Multiple Selection			<input type="checkbox"/>	-200	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Choices Add Delete Undo **Sub Choices** Add Delete Undo

Order	Choice ID	Choice Description	Autofill search words (comma separated)	Value
10	D	Phd	Phd	
20	G	Degree	Degree	
30	H	HNC/D	HNC	
40	N	NC/D	NC/D	
50	A	A Level	A Level	
60	O	Standard/O Grades	Standard/O Grades	

Order	Choice ID	Sub Choice Description	Value
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Update Save and Close Abandon Help



Desktop, CE due for callback. Time added to callback column

In Desktop - Contact event time has been added to the callback column.

Callback by	Done	Consultant
30/05/15 12:25	<input type="checkbox"/>	IVAN
30/05/15 15:4	<input type="checkbox"/>	IVAN
31/08/16 17:07	<input type="checkbox"/>	IVAN

SQLTool. Line numbering and go to line added

In Maintenance - SQL Tool line numbering and a 'go to line number' sections have been added.



The screenshot shows the SQL Tool interface. The top toolbar includes buttons for Execute, Browse, Previous, Next, Open, Save, Clear, Number Lines, Go to line 50, Commit, Rollback, and Plan. The SQL query is displayed in the main text area, with line 50 highlighted in yellow. The query is as follows:

```
37 isnull(tempjobrate.filter2,'Z') as sold,  
38 isnull(tempjobrate.filter1,'Z') as soawr  
39  
40 from tempjobrate key join tempjobpayband  
41 where tempjobrate.placementid = :pplacid and  
42 isnull(enddate,:pcutoff)>=:pcutoff and  
43 (tempjobrate.grade is null or tempjobrate.grade like isnull(entitygrade(:pvacid,:ppersid,:pplacid,null),'%')) and  
44 (tempjobrate.filter1 is null or tempjobrate.filter1 like isnull(entityratefilter(1,null,:pvacid,:ppersid,:pplacid,null),'%')) and  
45 (tempjobrate.filter2 is null or tempjobrate.filter2 like isnull(entityratefilter(2,null,:pvacid,:ppersid,:pplacid,null),'%')) and  
46 (tempjobrate.filter3 is null or tempjobrate.filter3 like isnull(entityratefilter(3,null,:pvacid,:ppersid,:pplacid,null),'%'))  
47  
48 union all  
49  
50 select
```

In addition, pressing Ctrl + A acts as a shortcut to select all SQL.

The screenshot shows the SQL Tool interface with the entire SQL query selected. The selection is indicated by a blue highlight across all lines of the query. The query is as follows:

```
37 isnull(tempjobrate.filter2,'Z') as sold,  
38 isnull(tempjobrate.filter1,'Z') as soawr  
39  
40 from tempjobrate key join tempjobpayband  
41 where tempjobrate.placementid = :pplacid and  
42 isnull(enddate,:pcutoff)>=:pcutoff and  
43 (tempjobrate.grade is null or tempjobrate.grade like isnull(entitygrade(:pvacid,:ppersid,:pplacid,null),'%')) and  
44 (tempjobrate.filter1 is null or tempjobrate.filter1 like isnull(entityratefilter(1,null,:pvacid,:ppersid,:pplacid,null),'%')) and  
45 (tempjobrate.filter2 is null or tempjobrate.filter2 like isnull(entityratefilter(2,null,:pvacid,:ppersid,:pplacid,null),'%')) and  
46 (tempjobrate.filter3 is null or tempjobrate.filter3 like isnull(entityratefilter(3,null,:pvacid,:ppersid,:pplacid,null),'%'))  
47  
48 union all  
49  
50 select
```

Placement. Read-only vacancy roles view added

Users can now view contacts with roles within Placement – Vacancy Roles as Read Only so that if a contact does not have the appropriate role it can be added Vacancy – Vacancy Roles.



Temp Placement of Eenna Abede as Bean Counter at 10 Group PLC

Navigation: Vacancy Reports Help Delete Withdraw

Details	Candidate	Eenna Abede	Start Date	07/10/2016
Split	Company	10 Group PLC, Yo Hall	Leave Date	20/10/2016
Contact Events	Job Title	Bean Counter	Department	Commercial
Rates	Client Department		Consultant	IVAN
AWR Role	PO Numbr.		Our Ref.	3478
AWR Linked	Contract		Concurrent or Shifts	<input type="checkbox"/>
Placements	Placement Date	10/10/2016	Days per Week	5
Timesheets	Override Invoice L		Work Pattern	MTWT_S_ 09:00 8 hours

Contact	Job Title	Department	Role
Yary Hall			Contract Manager

Accounts
Staged
Invoices
Questionnaire
Notes
Contacts
Documents
Expense
Benefit
Location Map
Directions
Vacancy Roles

Option on changing Placement Leave date to offer to change Vacancy end date

When changing a contract desk placement leave date IQX will also offer to change the vacancy end date to keep the vacancy end date and placement leave date in sync.

In addition, a user is offered the opportunity to Set the Vacancy to filled.

Tempdesk - Timesheets - Clear All Dispatch Details

In temp Desk - Timesheets to new columns are been added which sure dispatch date and dispatch method. Right click on the column headings 'Dispatch Date ' or 'Dispatch Method ' will allow a user to clear either one or all dispatch details.

<input type="checkbox"/>	Document	<input type="checkbox"/>	Show Hours
Comment	Dispatch Date	Dispatch Method	
	13/10/2016	EM	
	13/10/2016	EM	

Notifications

An alternative to Branding is being developed to improve notification workflow. A robust system for



shift notifications is the first stage of this process.

This change affects Shift Match/Book and Shift Confirmations.

In shift confirmations tick boxes on the right hand side of the view allow the user to to notify client and/or temp for shift confirmations and cancellations.

Shift Confirmations for Researcher - Legal, 10 Group PLC

Week Beginning

15/08/2016

Week(s)

1

◀◀

◀

▶

▶▶

Candidate

Save and Close

Include Confirmed

Select All

None

Abandon

Select All

None

SMS / Email Query

Select All

None

Our Ref.	Date	From	To	Description	Person	Cancelled	Cancel Reason	Client Confirmed	Confirmed With	Temp Confirmed	Their Ref.	Grade	Note	Send Query	Notify Client	Notify Temp
15...	Mon 15/08/2016	08:00	17:30	Day	Brown, Yvonne	<input checked="" type="checkbox"/>	Temp cancelled	<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15...	Tue 16/08/2016	08:00	17:30	Day	Brown, Ayesha	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15...	Tue 16/08/2016	08:00	17:30	Day	Brown, Yvonne	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15...	Wed 17/08/2016	08:00	17:30	Day	Brown, Yvonne	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15...	Thu 18/08/2016	08:00	17:30	Day	Brown, Yvonne	<input checked="" type="checkbox"/>	Temp sick	<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15...	Fri 19/08/2016	08:00	17:30	Day	Smythe, June	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15...	Sat 20/08/2016	08:00	17:30	Day	Smythe, June	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15...	Sun 21/08/2016	08:00	17:30	Day	Smythe, June	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

On clicking save and close a new window opens for each notification.



Notify Candidate about Shift Confirmation

Template: **Notify Candidate about Shift Confirmation** ☒ Create Contact Event

Template	Type
Notify Candidate about Shift Confirmation	EMAIL
Alternative Candidate Shift Notify	EMAIL

Recipients:

Attachments:

Subject:

Ayesha

You will be working as Researcher - Legal

at Baldwin Inc., 36 Main Road, EDINBURGH, EH1 8TF

Tuesday 16/08/2016 08:00 – 17:30

Ivan Baldwin
Consultant
Events

Each shift confirmation email or SMS allows the selection of available templates; creation of a contact event; additional removal of recipients; inclusion of attachments and the ability to edit the email/SMS prior to sending. The refresh button allows the user to remove any changes made. The expand button enables the user to open records related to the email e.g. company, vacancy etc.

In Shift Match/Book the procedure is the same as above.

IQX is available to give assistance with setting up this functionality.

Add function to configure Alert in Expiry Date view

Additional information can be added to the alert column in expiry date.

Information is displayed in the alert column at Temp Desk – Expiry Dates.

This requires System Administrator set up.



Person, Payroll. Checkers for IBAN and Swift on ellipses

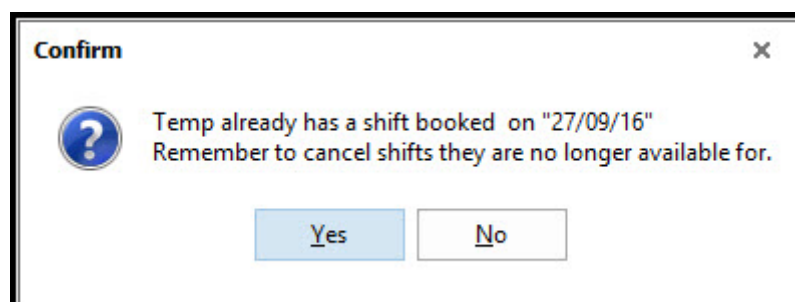
In Person – Payroll - checkers for IBAN and Swift banking numbers have been added as ellipses at the end of both fields. These ellipses take the user to websites where IBAN and Swift numbers can be verified.

Composite Co Template	
Supplier Code	
Payroll Number	0000M1
Start Date	14/04/2009
HMRC EI Reason	PAYE or Not Selected
Bank Details	YORKSHIRE BUILD SOCY, Yorkshire BS Collections 1 Code 00-00-00 A/c No. 01451451
International Bank Codes	
SWIFT BIC	
IBAN	
Currency	
Pay Method	BACS
Pay Frequency	Weekly
Tax Method	PAYE by the Agency
HMRC Engagement Detail	None

This requires System Administrator setup.

Flag or warn when entering unavailability entered and the temp is already booked for work

When a candidate has been booked for a shift and a user attempts to add unavailability in Person – Diary a warning message appears reminding the user that the candidate has previously been booked. This feature does not stop the addition of unavailability, it only serves to warn the user.



Person, New and Register. New Department has temp/perm pre-ticked from user roles

When registering an existing candidate to a new department or adding a new candidate the temp/perm tick boxes will be pre-ticked according to the user's role.



Role Group	All		Search	
Group	Role	Search Criteria Group	Assigned	Expires
GENERAL	Permanent Consultant		<input checked="" type="checkbox"/>	Key role: u
GENERAL	Temp Consultant		<input type="checkbox"/>	Key role: u
GENERAL	Accounts Clerk		<input checked="" type="checkbox"/>	Key role: u

Register Candidate in the Industrial department

Please tick Permanent and/or Temp to indicate the type of work for which registered

Department	Industrial
Permanent	<input checked="" type="checkbox"/>
Temp	<input type="checkbox"/>

Button to Add Invoice Address to Account Code form

A new button has been added in Company - Accounts which allows the user to add a new invoice address.

Account Code - ABC001 ABC Baldwin

Save And Close Abandon Update Send Statement Reports **New Invoice Address**

A/c Setup Group Timesheets on Invoice One invoice for each Company PO Numbr. and Period

Accounts Invoice Management Group Batch

Invoice Address 101 Varley Street

Once the following form has been completed all invoices for members of the company group will be sent to this invoice address.

Dialogue Box for Authorising Invoices

In Accounts - Authorise Invoices once the Authorise and Create PDF button has been pressed progress is displayed via the progress bar at the bottom of the window.



Name	Invoices
Sales Inv Shift Details	17

System Administrator

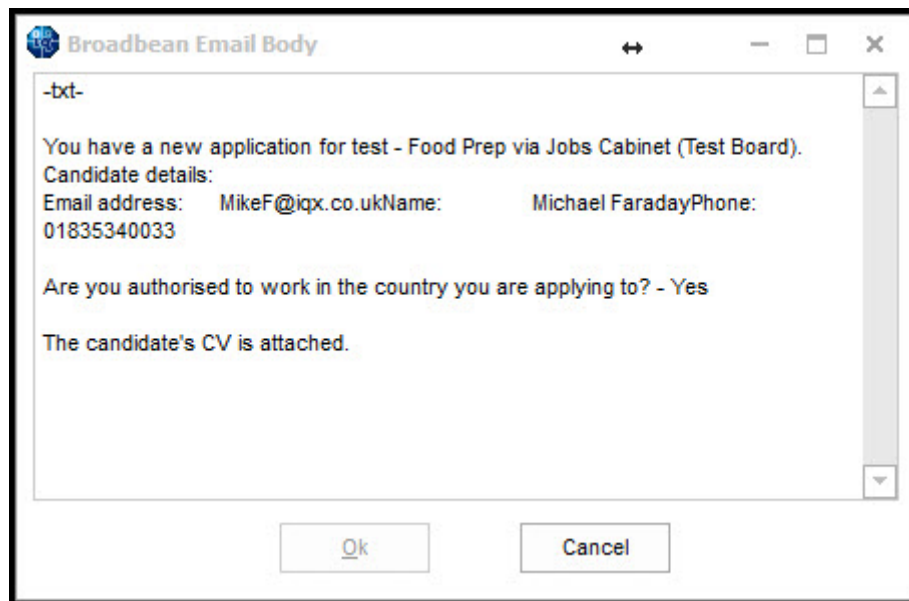
Broadbean - Switchable Job description/Vacancy Notes

A new switch has been added to IQX which allows either the Vacancy Job Description or Vacancy Notes to be added to Broadbean advert.

This is set up in Maintenance – General Settings – Settings 643.

Broadbean Email Body Text saved in IQX

The source of the application and email body text is now visible in the Import Candidate and add to Shortlist view. The email body text is stored as a contact event in the candidate record.



To save the text as a Contact Event a new contact event code can be set up in Maintenance - Agency Set up - Contact Event Types. A contact event code must be inserted in Maintenance - General Settings - Settings 642.

Semi-automatic import of Suitable candidates

Where Broadbean has ranked CVs outside IQX, 'Suitable' candidates can now be semi-automatically imported into IQX. When users press the Retrieve Candidates button, the Import Candidate And Add to Shortlist view is automatically called for each new 'Suitable' Candidate.

Where there are potential duplicate candidates that are Duplicate Candidate window will be displayed.



Add Person [X]

Surname

Forenames

Full Name

Salutation

Keyname

Email

Mobile

Home Phone

Work Phone

Address

State

Source

Division

Notes

This is set up in Maintenance-General Settings - Settings 640 and 641.

General Settings					
Name or Notes <input type="text" value="broad"/>		Search	Group <input type="text" value="All"/>	Branch <input type="text" value="All"/>	<input type="button" value="Get Colour"/> <input type="button" value="Save and Close"/> <input type="button" value="Abandon"/> <input type="button" value="Update"/> <input type="button" value="Help"/>
No	Group	Name	Value	Notes	
640 Settings		Broadbean Default Person State	Y	If you select to download only 'Suitable' candidates,	
641 Settings		Broadbean Auto Import Suitable Can...	Y		
642 Settings		Contact Event for Broadbean New ...	BB		
643 Settings		Broadbean Vacancy Advert	Y	Defaults to the Notes field, if Yes use the Other Not	
651 Settings		Enabled Broadbean Hybrid	Y	Only valid if broadbean is enabled.	
652 Settings		Broadbean Notify on Delivery URL			
653 Settings		Broadbean Reload on Completion URL		Reload on completion URL. Only current only applic	
654 Settings		Use https for Broadbean	Y	Controls whether Broadbean link uses https or http.	
655 Settings		Broadbean Stylesheet		Specification Fully qualified URL of stylesheet eg Ex	
657 Settings		Broadbean Step1	Y	Choose whether or not to force the user to select t	

Increase BroadbeanCandidate filename field size

Some candidates may submit CV's with a document title up to 100 characters in length. Broadbean



and IQX is able to add long CV documents to the database.

Invoicing, attaching timesheets. If general setting is on can turn off at company

When invoicing, the choice of NOT sending linked timesheets with an invoice can be set at global and account level.

The global setting to not include linked timesheets is Maintenance - General Settings - Accounts 240.

240 Accounts	PDF Invoice includes scanned timesheets	Y
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Local setting is in Company - Accounts - Invoice PDF exclude timesheets.

Invoice PDF exclude Timesheets	<input type="checkbox"/>
--------------------------------	--------------------------

Generally, local settings override global settings.

Timesheet. Cancel reasons can be used

The timesheet Cancel or Correct process has been enhanced by the inclusion of a drop-down list of previously set up reasons e.g. rates, client, hours, breaks.

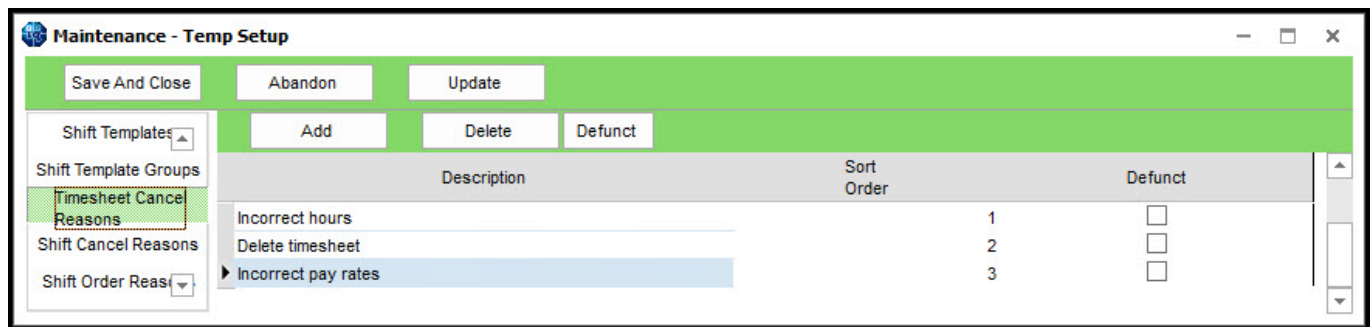
Timesheet for Beedley Johnathon as Veg Prep at ... X

Select a Cancel Reason

Incorrect hours
Incorrect pay rates
Delete timesheet

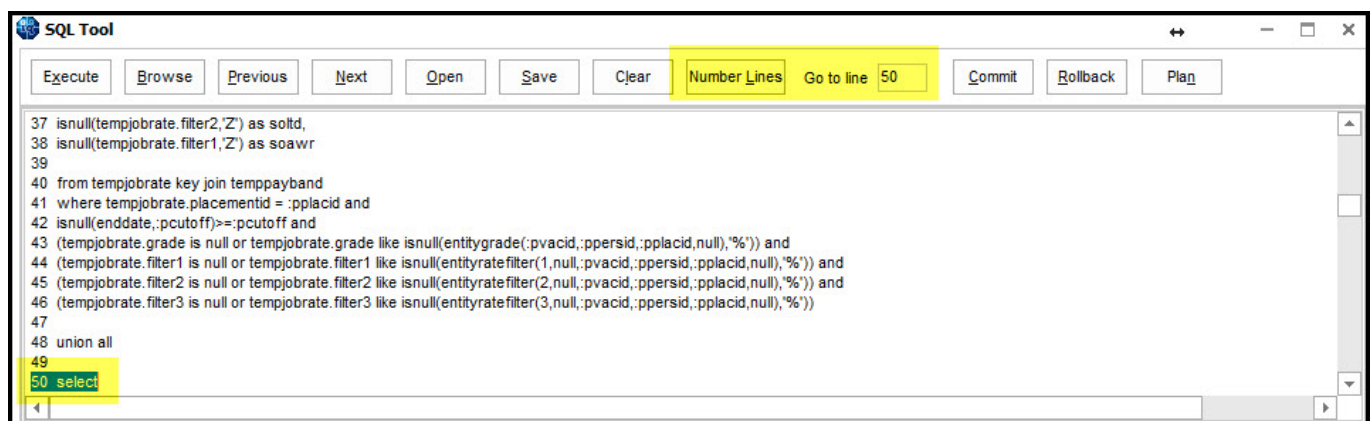
The reasons will appear on both the cancelled and amended timesheets.

Reasons can be set up in Maintenance - Temp Setup - Timesheet Cancel Reasons.



SQLTool. Line numbering and go to line added

In Maintenance – SQL Tool line numbering and a ‘go to line number’ sections have been added.



In addition, pressing Ctrl + A acts as a shortcut to select all SQL.



Validation function for consultant change on major records

A new function has been added which enables a System Administrator to stop changes to the consultant field in major records.

This function can be inserted in Maintenance – Database Functions – Change Functions – Consultant Change.

Below is an example of a validation function which validates a change in consultant.



Validation functions can open forms with specified views

New parameter has been added which allows validation functions to open up forms with specified views.

For example: set "rv" = '^P''persid''»PAYROLL''char(9)''This temp has no NI number. Please enter this immediately' will open up the person form with the payroll view open for the user to complete the temp's national insurance number.

The format is: [^][{P|C|E|L| I|T|V}id][>>view][<TAB>message]
This applies to validations returning P,C,E,L and V only.

If a view doesn't exist or cannot be selected it will open with the first view.

Notifications

An alternative to Branding is being developed to improve notification workflow. A robust system for shift notifications is the first stage of this process.

But Notification templates are set up in Maintenance - Temp Setup - Notifications. Here templates can be set up according to transmission type, notification type, recipient type and template.

Below is an example of a template for email query candidate about shift confirmation. Boilerplate text codes can be used in the templates as well as HTML emails.



2024/05/16 15:02

20/27

Release 2.16.10

Maintenance - Temp Setup

Save And Close Abandon Update

Unavailability Reasons Add Delete Help

Description	Transmission Type	Notification Type	Recipient Type	Template	Sort Order	Group Code	Defunct
SMS Query Candidate about Shift Confirmation	SMS	QueryConfirm	Candidate	Can you wor	5		<input type="checkbox"/>
Email Query Candidate about Shift Confirmation	Email	QueryConfirm	Candidate	<h2>{APP_S	10		<input type="checkbox"/>
Notify Candidate about Shift Confirmation	Email	NotifyConfirm	Candidate	<p>{APP_SA	10		<input type="checkbox"/>
Notify Client about Shift Confirmation	Email	NotifyConfirm	Client	<p>{COM_SA	10		<input type="checkbox"/>
Alternative Candidate Shift Notify	Email	NotifyConfirm	Candidate	<h2>Hello!</t	20		<input type="checkbox"/>
Notify Candidate about Shift CANCELLATION	Email	NotifyCancel	Candidate	<p>{APP_SA	50		<input type="checkbox"/>
Notify Client - Shift CANCELLATION	Email	NotifyCancel	Client	<p>{COM_SA	60		<input type="checkbox"/>
Ask Candidate about Availability for Shifts	Email	QueryBook	Candidate	<p>{APP_SA	70		<input type="checkbox"/>
SMS Notify Candidate about Shift Confirmation	SMS	Notify Confirm	Candidate	Confirming y	80		<input type="checkbox"/>

External Price List

Template

<h2>{APP_SALUTATION}</h2>
<h4>Can you work these shifts?</h4>
<p>{VAC_POSITION}</p>
<p>at {COM_COMPANYNAME}</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

The templates are available to be used in Shift Match/Book and Shift Confirmations.

In shift confirmations tick boxes on the right hand side of the view allow the user to to notify client and/or temp for shift confirmations and cancellations.

Shift Confirmations for Researcher - Legal, 10 Group PLC

Week Beginning 15/08/2016 Week(s) 1

Candidate Save and Close Include Confirmed Select All None Abandon Select All None SMS / Email Query Select All None

Our Ref.	Date	From	To	Description	Person	Cancelled	Cancel Reason	Client Confirmed	Confirmed With	Temp Confirmed	Their Ref.	Grade	Note	Send Query	Notify Client	Notify Temp
15...	Mon 15/08/2016	08:00	17:30	Day	Brown, Yvonne	<input checked="" type="checkbox"/>	Temp cancelled	<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15...	Tue 16/08/2016	08:00	17:30	Day	Brown, Ayesha	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15...	Tue 16/08/2016	08:00	17:30	Day	Brown, Yvonne	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15...	Wed 17/08/2016	08:00	17:30	Day	Brown, Yvonne	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15...	Thu 18/08/2016	08:00	17:30	Day	Brown, Yvonne	<input checked="" type="checkbox"/>	Temp sick	<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15...	Fri 19/08/2016	08:00	17:30	Day	Smythe, June	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15...	Sat 20/08/2016	08:00	17:30	Day	Smythe, June	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15...	Sun 21/08/2016	08:00	17:30	Day	Smythe, June	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

On clicking save and close a new window opens for each notification.



Notify Candidate about Shift Confirmation

Template: **Notify Candidate about Shift Confirmation** ☒ Create Contact Event

Template	Type
Notify Candidate about Shift Confirmation	EMAIL
Alternative Candidate Shift Notify	EMAIL

Recipients:

Attachments:

Subject:

Ayesha

You will be working as Researcher - Legal

at Baldwin Inc., 36 Main Road, EDINBURGH, EH1 8TF

Tuesday 16/08/2016 08:00 – 17:30

Ivan Baldwin
Consultant
Events

Each shift confirmation email or SMS allows the selection of available templates; creation of a contact event; additional removal of recipients; inclusion of attachments and the ability to edit the email/SMS prior to sending. The refresh button allows the user to remove any changes made. The expand button enables the user to open records related to the email e.g. company, vacancy etc.

In Shift Match/Book the procedure is the same as above.

IQX is available to give assistance with setting up this functionality.

Add function to configure Alert in Expiry Date view

Additional information can be added to the alert column in expiry date by creating a function in Maintenance – Database Functions – Custom Column Settings – temp desk expiry and alert extra.

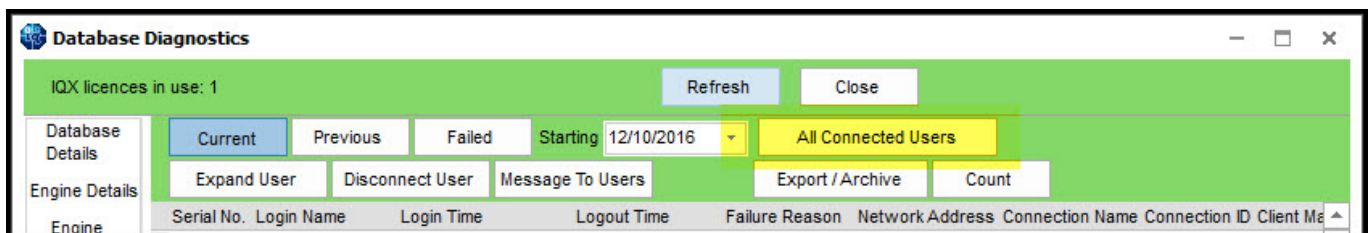
Information is displayed in the alert column at Temp Desk – Expiry Dates.



Custom Column Settings	▶	Vacancy Shift Matcher Numeric Custom Column
Compliance	▶	Vacancy Shift Matcher Text Custom Column
IQX Hub	▶	Vacancy Shift Matcher Custom Sort Order
Temp Rate and Grade Functions	▶	Candidate Shift Matcher Numeric Custom Column
Communications inc. Email	▶	Candidate Shift Matcher Text Custom Column
Notifications	▶	Shift Matcher Custom Shift Description
Content for Document Display Views		Shift Matcher Custom Shift Skill Description
Temp Shift Editing Allowed		Temp Colour for Temp Desk
Temp Shift Confirmation Change		Temp Desk Custom Grid Column
Temp Timesheet Complete		Temp Desk Expiry Alert Extra

Maintenance, Database Diagnostics, Connections. All connected users button added

In Maintenance – Database Diagnostics – Connections there is now a button which allows the display of all connected users.

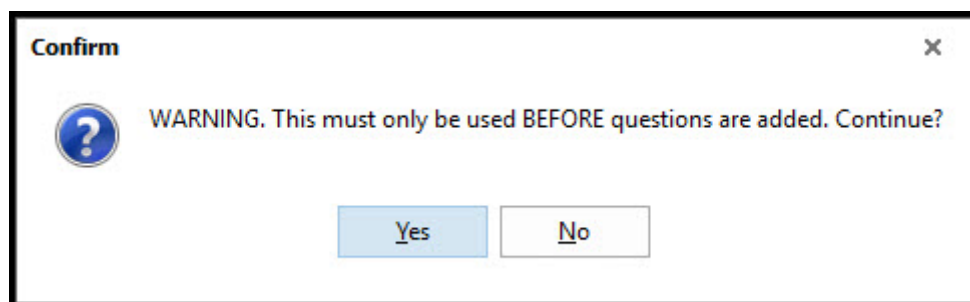


Maintenance, Document Types. Add and Remove Buttons added

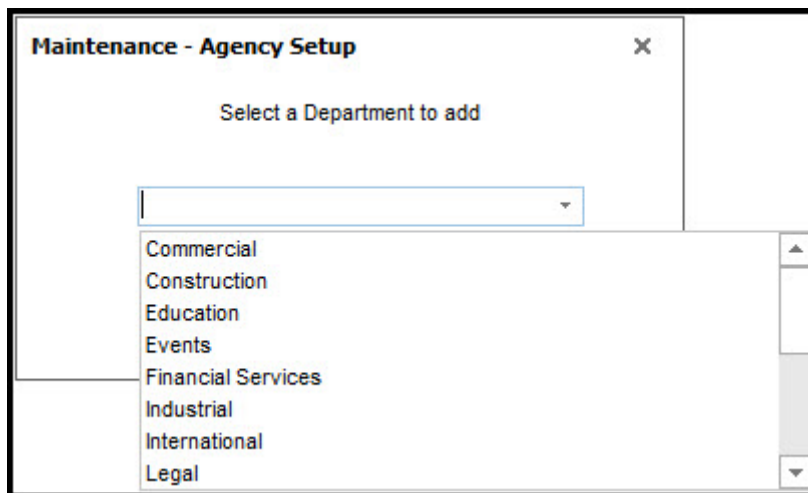
In Maintenance – Agency setup – Document types three new buttons have been inserted, (Initial Departments, Add Department and Remove Department).

These buttons only work where the document type has compliance ticked against it.

A warning message will appear if initial departments is selected informing the user that setting initial departments must be done before questions are added.

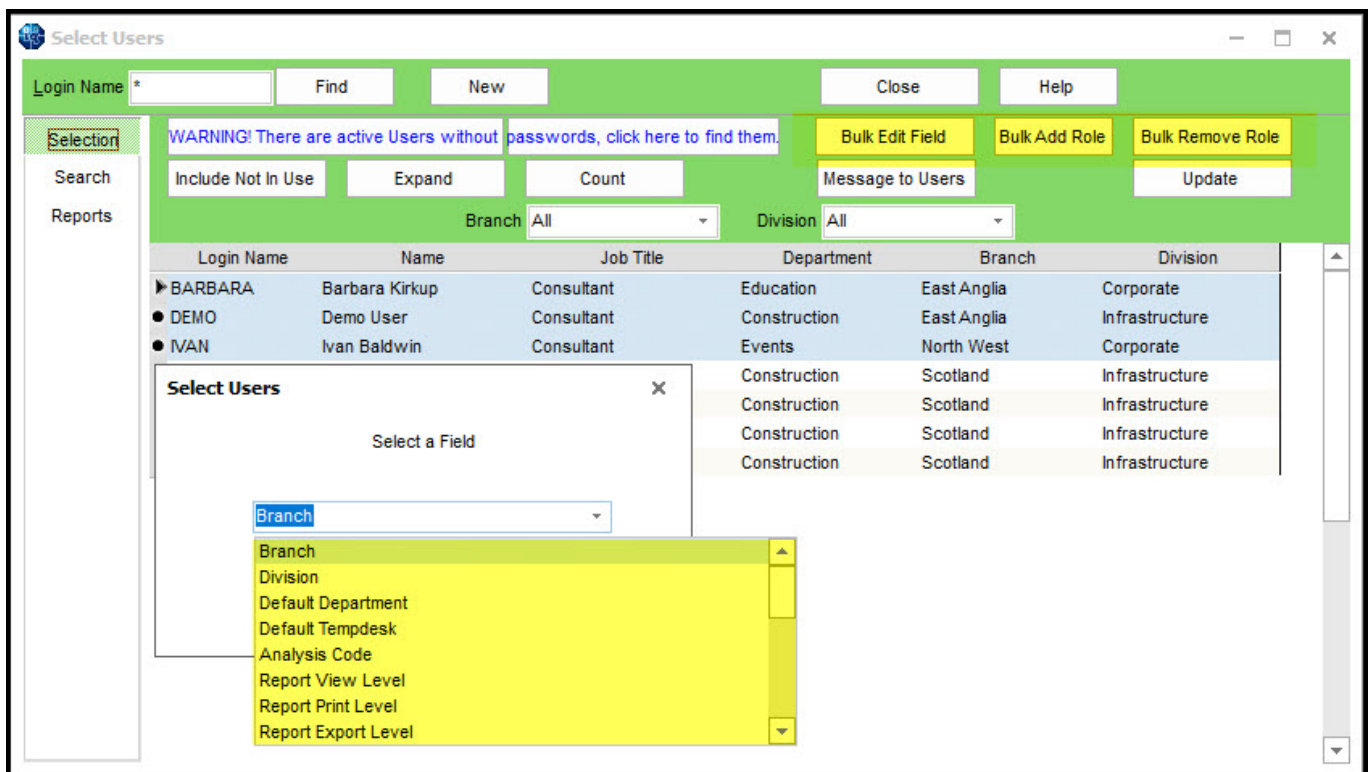


Add and Remove Department buttons give the user the option to select the Department to add or remove.



Bulk allocate or unassign roles/report level/inbox/ to multiple users

Three new buttons have been added to Maintenance - Users which allow a System Administrator to allocate, or assign, report levels and in boxes to multiple users. To use this function select users you require to make the global change to and select the fields you wish to change.



Likewise, to add or remove a role users and click add role or remove role as appropriate and select the required role and complete the questions.

Changing sort order on Questionnaire

In Maintenance - Agency Setup - Departments - Questionnaires and Maintenance-Questionnaires and new button has been added Redo Order.



Questionnaire Maintenance

Candidate Questionnaire for Construction Department

Questions Add Delete Undo # for id Find Questions Redo Order

Order	Question ID	Question Description	Type	Min Step Size	Units	Required	Group	Audit	Web Publish	Web View	Search Hide	Head Coll
5	TT	***Compliance***	Heading			<input type="checkbox"/>	-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	PS	Position Sought	Single Selection			<input type="checkbox"/>	-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20	SAL	Salary wanted	Numeric			<input type="checkbox"/>	-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30	QL	Qualifications	Multiple Selection			<input type="checkbox"/>	-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
40	JT	Job Title	Multiple Selection			<input type="checkbox"/>	-2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Once pressed this button will rearrange the order of each question to provide gaps between each question for additional related questions.

Confirm

This will redo the order in steps of 10. Continue?

Yes No

Questionnaire Maintenance

Candidate Questionnaire for Construction Department

Questions Add Delete Undo # for id Find Questions Redo Order

Order	Question ID	Question Description	Type	Min Step Size	Units	Required	Group	Audit	Web Publish	Web View
10	TT	***Compliance***	Heading			<input type="checkbox"/>	-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20	PS	Position Sought	Single Selection			<input type="checkbox"/>	-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30	SAL	Salary wanted	Numeric			<input type="checkbox"/>	-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
40	QL	Qualifications	Multiple Selection			<input type="checkbox"/>	-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Person, Payroll. Checkers for IBAN and Swift on ellipses

In Person - Payroll - checkers for IBAN and Swift banking numbers have been added as ellipses at the end of both fields. These ellipses take the user to websites where IBAN and Swift numbers can be verified.



Composite Co Template	
Supplier Code	
Payroll Number	0000M1
Start Date	14/04/2009
HMRC EI Reason	PAYE or Not Selected
<input checked="" type="checkbox"/> Bank Details	YORKSHIRE BUILD SOCY, Yorkshire BS Collections 1 Code 00-00-00 A/c No. 01451451
<input type="checkbox"/> International Bank Codes	
SWIFT BIC	
IBAN	
Currency	
Pay Method	BACS
Pay Frequency	Weekly
Tax Method	PAYE by the Agency
HMRC Engagement Detail	None

Viewing international bank codes in IQX is set up in Maintenance - General Settings - Switchable Fields 1010.

1010 Switchable Fields	Show International Bank Codes	Y
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Person. -2 group questions editable by clearance on headline and questionnaire

In in person record it is now possible to display questions in the top right hand view which are editable if the user has compliance rights set up.

Questions set up in departmental or general questionnaires need to be grouped using -2 for them to be displayed and editable in this manner.



Questionnaire Maintenance

Candidate Questionnaire for Construction Department

Questions Add Delete Undo # for id Find Questions Redo Order

Order	Question ID	Question Description	Type	Min Step Size	Units	Required	Group	Audit	Web Publish	Web View	Search Hide	Head Coll
60	BE	Professional membership?	Single Selection			<input type="checkbox"/>	-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Choices Add Delete Undo Sub Choices Add Delete Undo

Order	Choice ID	Choice Description	Autofill search words (comma separated)	Value
10		Yes	Yes	
20	N	No	No	

Update Save and Close Abandon Help

Questionnaire Maintenance

Candidate Questionnaire

Questions Add Delete Undo # for id Find Questions Redo Order

Order	Question ID	Question Description	Type	Min Step Size	Units	Required	Group	Audit	Web Publish	Web View	Search Hide	Head Coll
440	FF	Can you do a headstand?	Single Selection			<input type="checkbox"/>	-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Choices Add Delete Undo Sub Choices Add Delete Undo

Order	Choice ID	Choice Description	Autofill search words (comma separated)	Value
10		YES	YES	
20	N	NO	NO	

Update Save and Close Abandon Help

-2 group questions are displayed at the bottom of the window.

Navigation: Back, Forward, Home, Search, Reports, Register, Delete, Search, Help, Registration Report

Perm	Division	Job Title	Simple just be?	Can you do a headstan
2nd Not	Thomas Abraham	Bricklayer, Joiner	Yes	YES

Woodpecker Script BROWSECURURL added

The new parameter BROWSECURURL has been added allowing the creation of a button which reports the current browser URL. This information can be used when writing/drafting reports.

Ability to see account information for orphaned account codes

where an account code has become of linked from a company it is now possible to see the account information and a list of the documents/payments etc. In accounts setup - accounts and for sales ledger IDs clicking the document button will display company, accounts for linked accounts or a list of documents for unlinked accounts.



Maintenance - Accounts Setup

Save And Close

Abandon

Update

Currencies

Countries

VAT Rates

Documents

Add

Delete

Help

Ledger ID	Account Code	Name
Cash	BANK1	Main Bank Account
Sales	159	test

Orphan Account Documents - 159

Save And Close

Abandon

Update

Expand

Type	Our Ref	Their Ref	Date	Amount	Outstanding	Status
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