Release 2.22.09

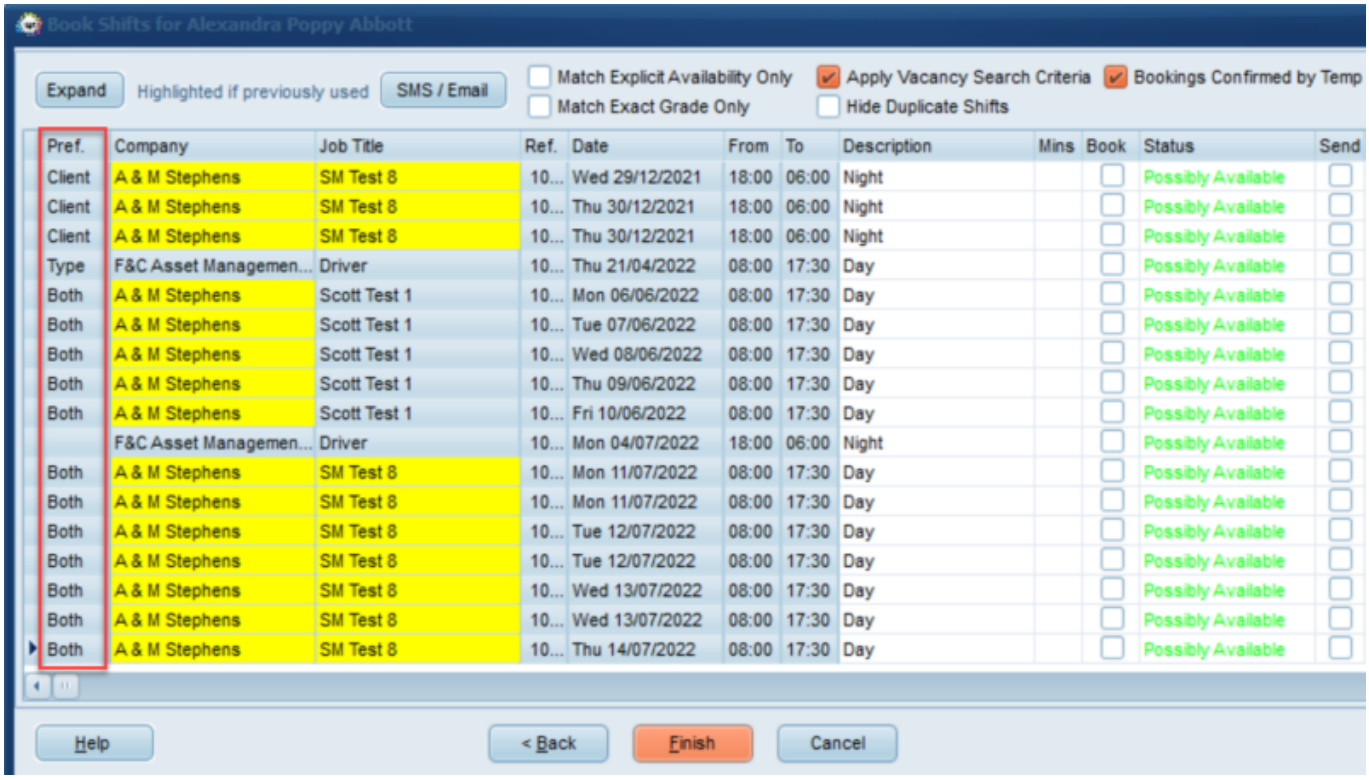
If you have custom forms defined in IQX, not all new features may be available to you. Your agency custom forms are shown on Help – About.

- Features
- Enhancements
- System Administrator
- Fixes

FEATURES

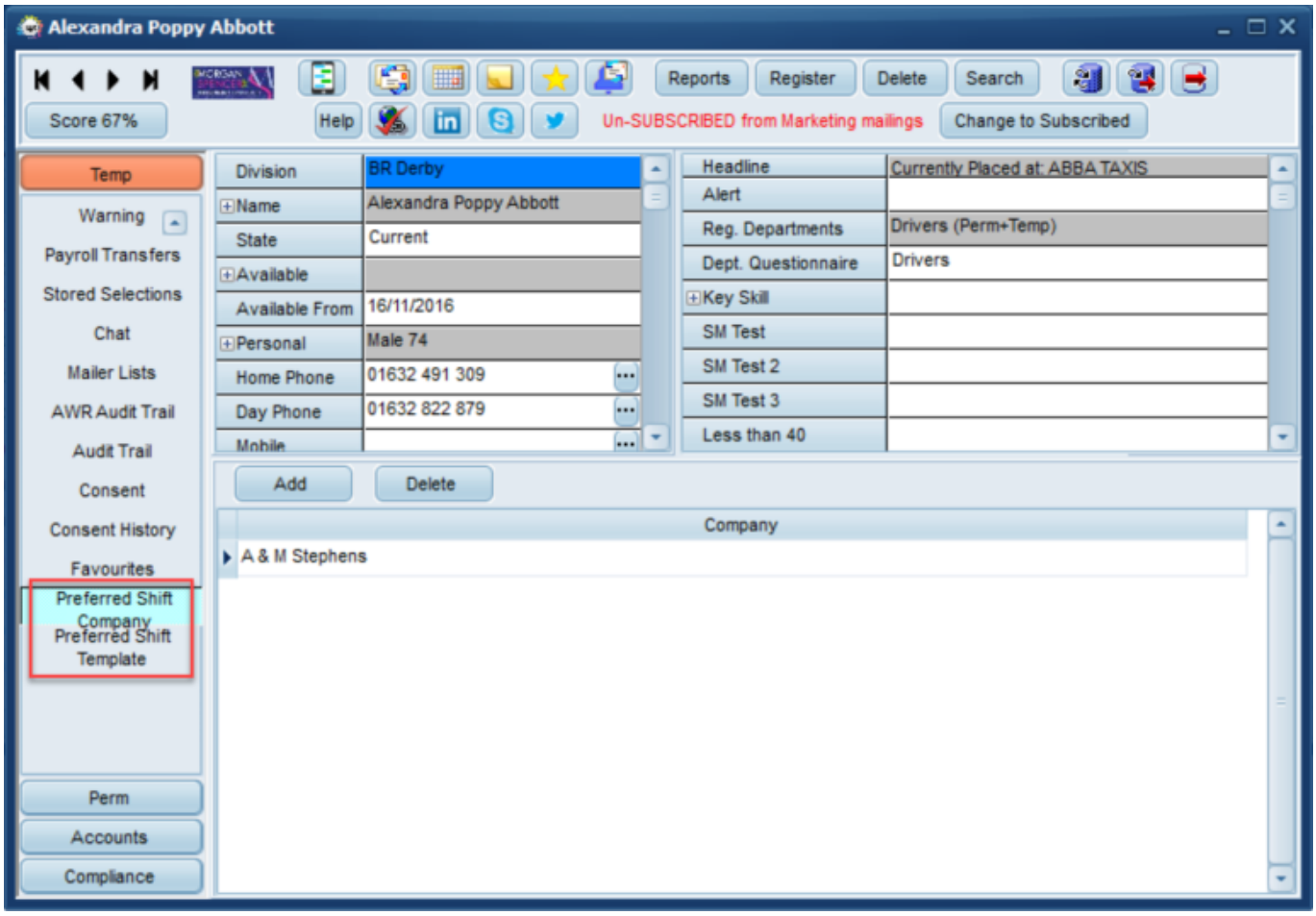
Candidates Preferred list of Clients or Shifts

For agencies whose candidates like to be able to state that they only want to work for particular clients or work specific shift types this can now be added to the candidate record so that consultants can see at a glance when booking shifts via the candidate diary which shifts are with preferred clients or shift types.



Pref.	Company	Job Title	Ref.	Date	From	To	Description	Mins	Book	Status	Send
Client	A & M Stephens	SM Test 8	10...	Wed 29/12/2021	18:00	06:00	Night			Possibly Available	
Client	A & M Stephens	SM Test 8	10...	Thu 30/12/2021	18:00	06:00	Night			Possibly Available	
Client	A & M Stephens	SM Test 8	10...	Thu 30/12/2021	18:00	06:00	Night			Possibly Available	
Type	F&C Asset Managemen...	Driver	10...	Thu 21/04/2022	08:00	17:30	Day			Possibly Available	
Both	A & M Stephens	Scott Test 1	10...	Mon 06/06/2022	08:00	17:30	Day			Possibly Available	
Both	A & M Stephens	Scott Test 1	10...	Tue 07/06/2022	08:00	17:30	Day			Possibly Available	
Both	A & M Stephens	Scott Test 1	10...	Wed 08/06/2022	08:00	17:30	Day			Possibly Available	
Both	A & M Stephens	Scott Test 1	10...	Thu 09/06/2022	08:00	17:30	Day			Possibly Available	
Both	A & M Stephens	Scott Test 1	10...	Fri 10/06/2022	08:00	17:30	Day			Possibly Available	
	F&C Asset Managemen...	Driver	10...	Mon 04/07/2022	18:00	06:00	Night			Possibly Available	
Both	A & M Stephens	SM Test 8	10...	Mon 11/07/2022	08:00	17:30	Day			Possibly Available	
Both	A & M Stephens	SM Test 8	10...	Mon 11/07/2022	08:00	17:30	Day			Possibly Available	
Both	A & M Stephens	SM Test 8	10...	Tue 12/07/2022	08:00	17:30	Day			Possibly Available	
Both	A & M Stephens	SM Test 8	10...	Tue 12/07/2022	08:00	17:30	Day			Possibly Available	
Both	A & M Stephens	SM Test 8	10...	Wed 13/07/2022	08:00	17:30	Day			Possibly Available	
Both	A & M Stephens	SM Test 8	10...	Wed 13/07/2022	08:00	17:30	Day			Possibly Available	
Both	A & M Stephens	SM Test 8	10...	Thu 14/07/2022	08:00	17:30	Day			Possibly Available	

Consultants can set the preferred clients and shift types on the new views on the candidate record.

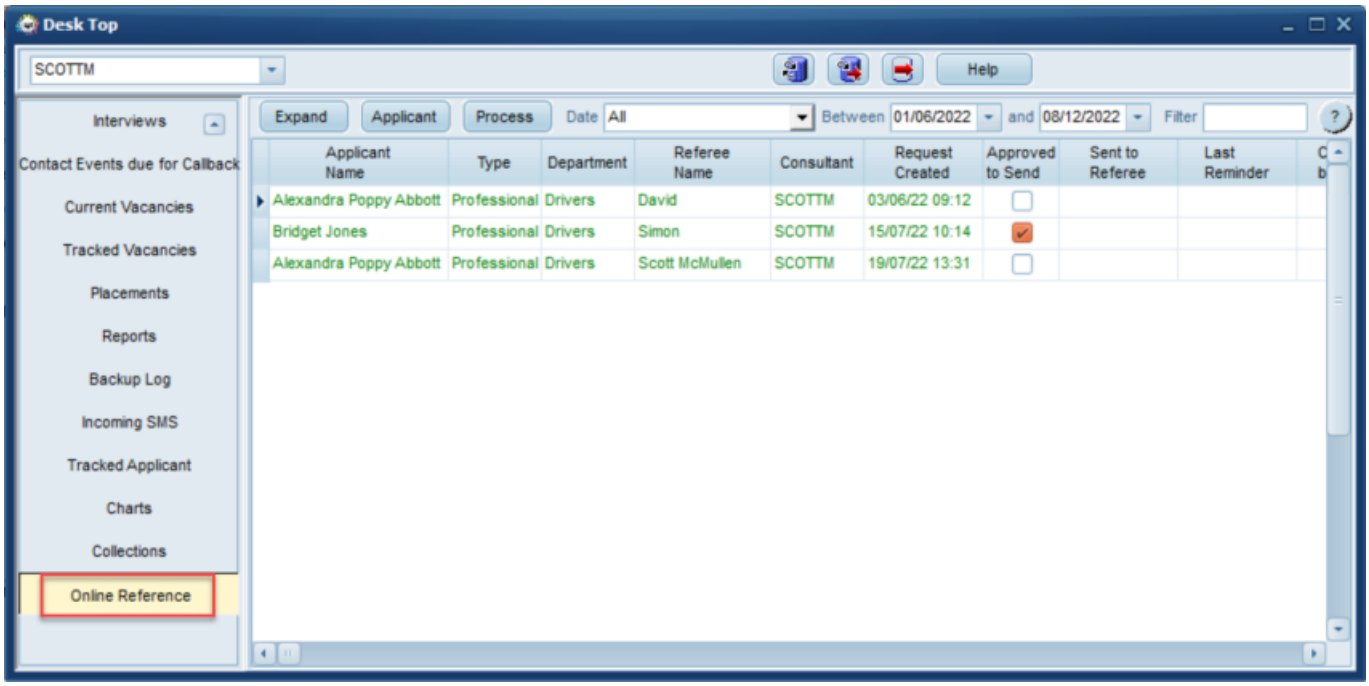


Please note this is only available through Person Diary, Book Shifts not through fill shifts, where you are searching from the Candidate's point of view.

This feature requires system administrator set up.

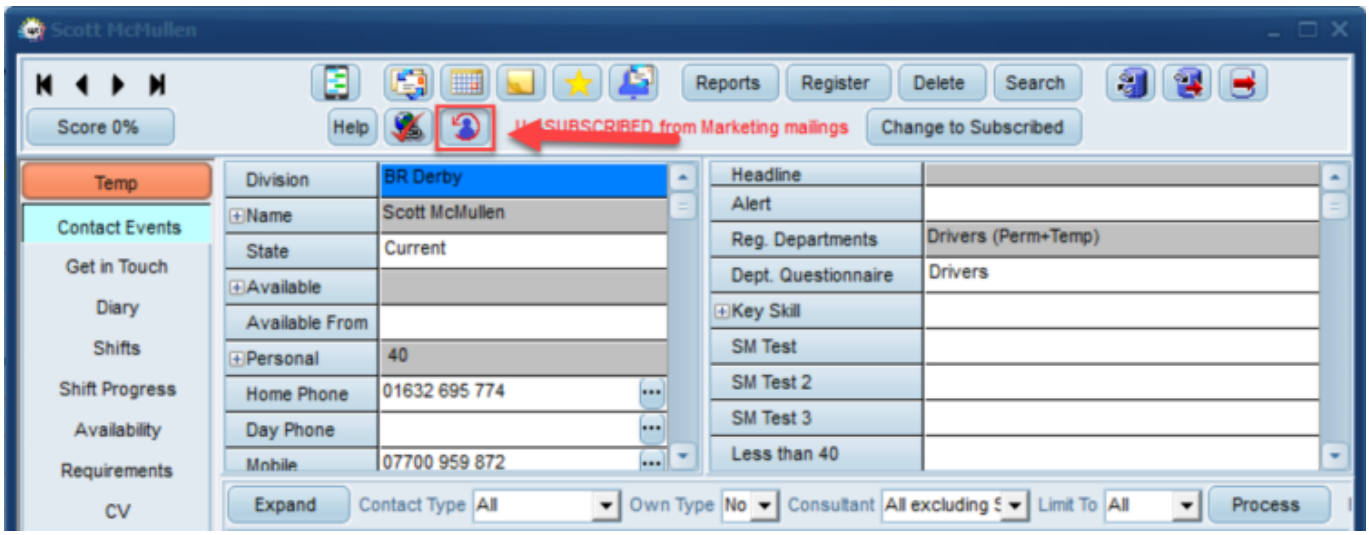
Online References Available from Desk Top

On the Desk Top there is a new view to easily manage your References - you can see what References are still outstanding and easily view References that have been returned.



Ability to Re-Register Candidates

It is now possible to trigger the custom “xregister” registration form for an existing candidate record. This means that you can invite a candidate to run through the online registration form even if they already have an IQX record. It can be used when you have a basic stub record and wish the candidate to fill in the rest, to update any missing registration details, to accept updated terms & conditions or invite the candidate to upload additional documents, references, etc.

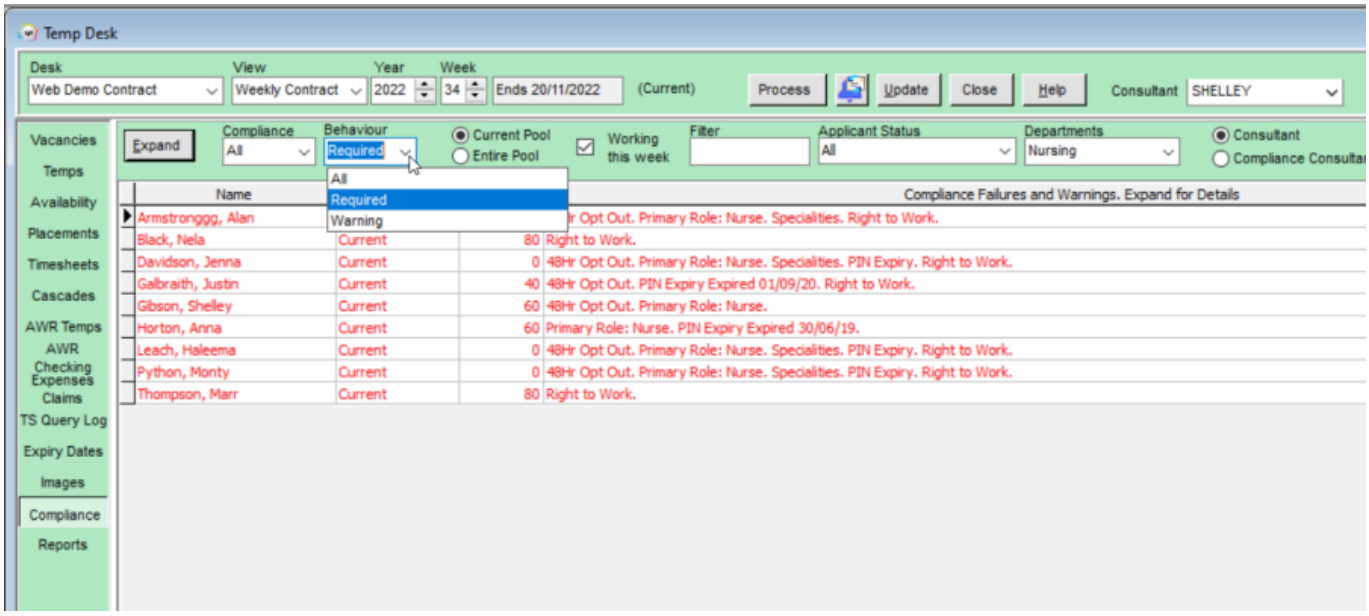


When the “Re-Register” button is pressed, the Candidate’s state is changed back to Incomplete Web Registered (or whatever state you have set). The candidate receives an email prompting them to log in and complete their registration. Upon login, they are taken through the “REREG” xregister route. Once they finish this, they are set back to the completed web-registered state.

This feature requires system administrator set up.

Behaviour Filter on Temp Desk Compliance

Users are now able to quickly access records that have required Compliance items by using the filter.



Warning when Timesheet Images too Large

You can now set a maximum size of Timesheet Image to link to a timesheet to ensure they are not too large for invoicing. Note if the first image in the folder exceeds the limit then a message will appear as soon as you open the Image Linking view.

This feature requires system administrator set up.

ENHANCEMENTS

Notifications Enhancements

You can now send Candidates the shifts which are available to be booked in a notification, and also include a link detailing what they need to do in order to book themselves into the shift.

Notifications can now be set up to change the Person Progress States when sent. This function is available on Desk Top ‘Progress due for Action’ and Vacancy ‘Progress/Shortlist’.

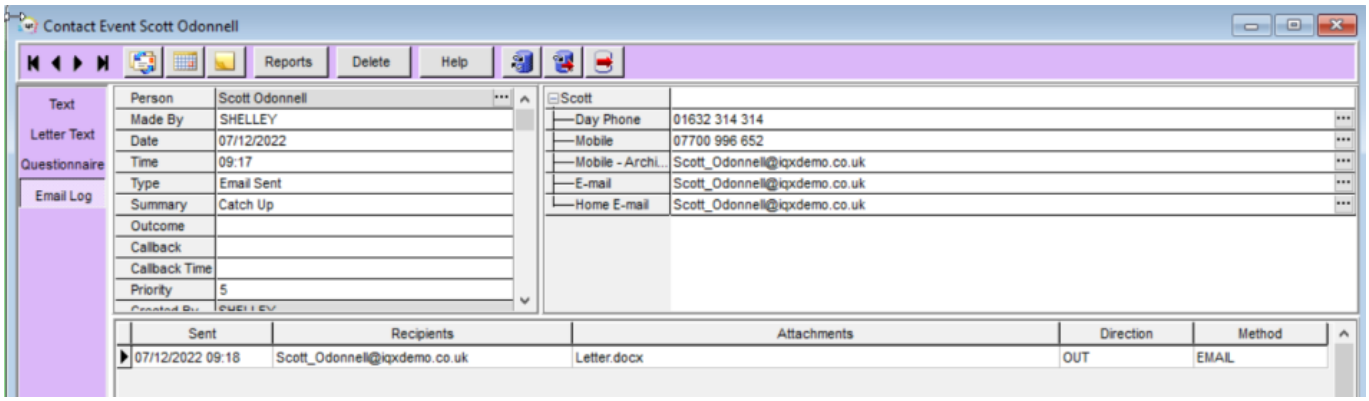
It is now possible to set a BCC email (s) on a Notification that will always be used when Sending.

Reports that are produced and sent with a notification can now be saved into the database.

For more information on Notifications please click here

Contact Event Enhancements

A means of being able to identify whether communications are incoming or outgoing and the method (i.e. sms, email or push notification) has been added to the database so this can be used in reports to monitor the agency communications. Users can view this information on the Email Log of the contact event.

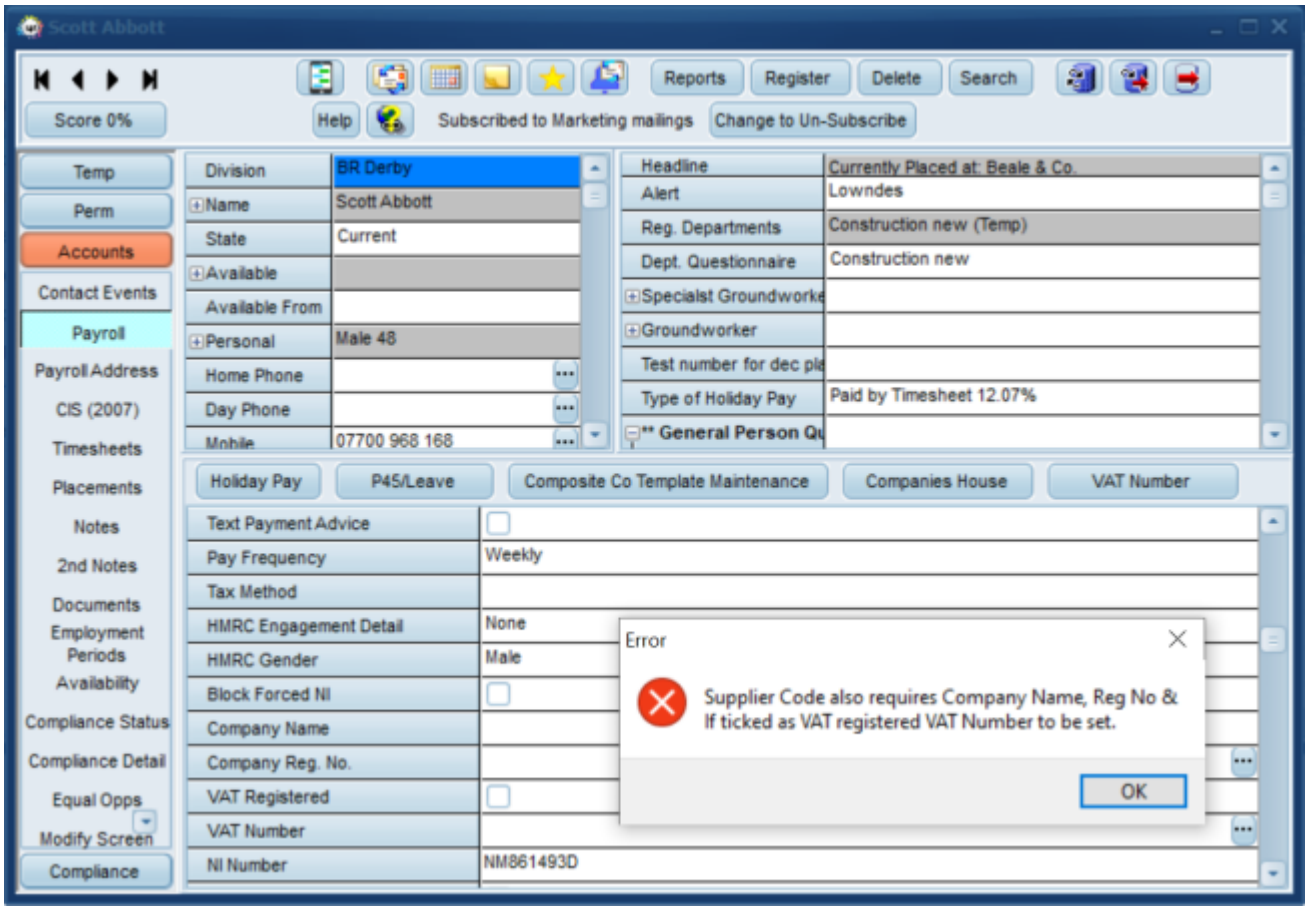


IQX can now integrate with Voodoo for sending SMS.

Contact Events for notifications will never be blank, if there is no code set in the notification template then it will look to the function and if the function is blank it will pick up from the general setting.

Self Bill Enhancements

When setting up a new supplier code users will be prompted to enter the company number and VAT number if applicable before creating the supplier code if they have not already been entered.



The Person Payroll view has been updated so that if the candidate has a supplier code the company name and VAT number now show but are not editable.

Changes to supplier codes are now an auditable item. This requires system administrator setup.

Temp Desk Expiry Date Exclusions

Temp desk Expiry dates can now be linked to Candidate states so that certain expiry dates can be excluded for certain states.

Deleting Linked Images from Completed Timesheets

We have added in a measure that means only users with the role ‘Accounts Clerk’ can delete a linked image from a completed timesheet.

For more information on Timesheet Image Linking please click here

Creating a new Timesheet from an existing one does not close the original

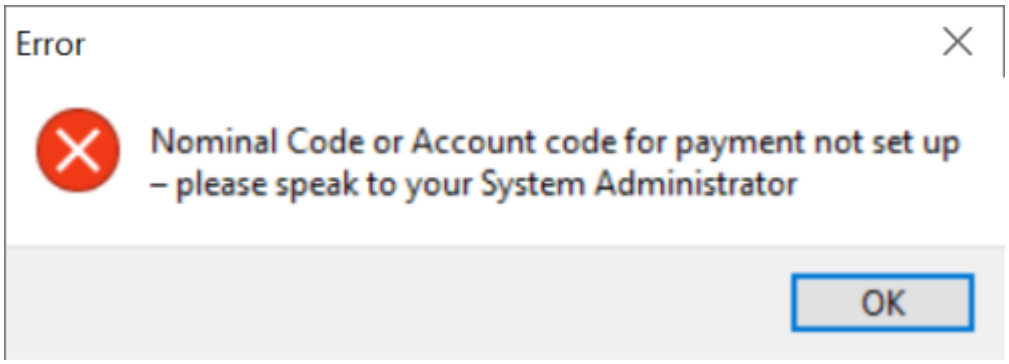
When creating a new timesheet from an existing completed timesheet the original timesheet remains open to allow users to compare rates etc.

Invoices - Add Docs button added to Temp, Perm and Ad Hoc PDF Invoices

The ability to ‘Add Docs’ has been added to all views of Temp, Perm and Ad Hoc PDF Invoices.

Clearer message when posting on Bulk Payments

The error message on bulk payments now makes it clearer what needs to be checked if the allocation fails.



Placement Terminology Enhancements

New Terminology Switch for Placement Questionnaire.

The terminology on Placement extension button can now be altered and maintained by the Agency.

This feature requires system administrator setup.

New Filter added to Placement Selector

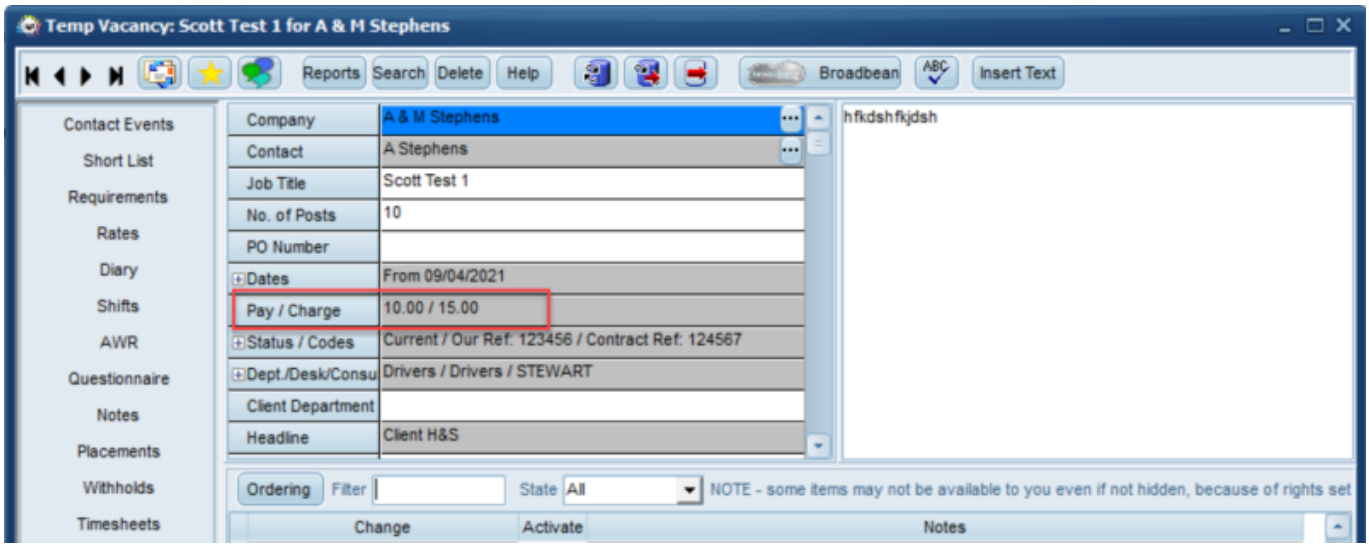
A Department drop down has been added to the Placement Selector to allow you to quickly search only for Placements associated to a specific department.

For more information on the Placement Selector and how to search for Placements please click here

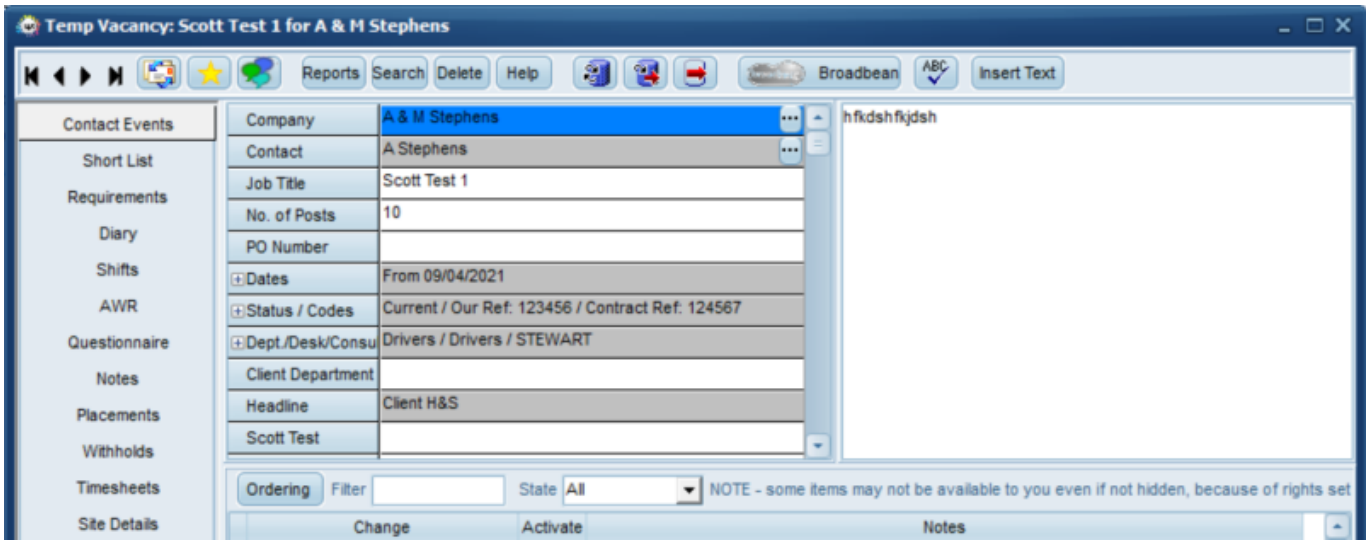
If Vacancy Rates Hidden also hides Pay & Charge lines

In a Vacancy if the Vacancy rates have been hidden using Modify Screen - Hide Vacancy Rates this will also remove the headline pay and charge rate line from showing in the main details of the vacancy.

With Vacancy Rates NOT hidden



With Vacancy Rates Hidden



Search results - Ability to tick all by Person State

If enabled, when searching for candidates from a Vacancy you can now bulk tick onto a shortlist by state.

For more information please click here

Warning added to Vacancy

The ability to add a warning has been added to vacancies.

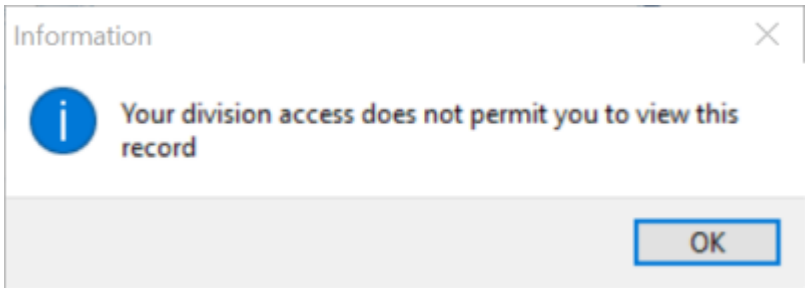
Holiday / Unavailability Enhancements

When entering Unavailability or Holiday into person record Availability or Diary view it automatically updates the placement on temp Desk (contract desk) and shows the short code for the Unavailability reason.

This feature requires system administrator setup.

Division Access Restriction Warning

Users that try to access a candidate record that is associated to a Division that they don't have access to now get a pop up advising that they can't access the record.

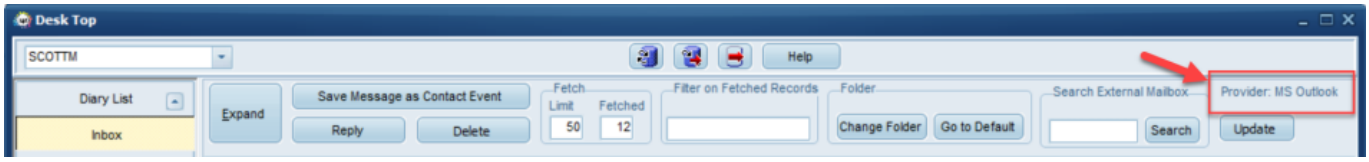


Fixed length Text Questions

You can now limit the number of characters in text questions so that candidates cannot offer numbers that are either shorter or longer than they should be. This is particularly useful if Candidates have a registration number of a set length.

Email Provider Shows in top right of Desk Top Inbox

Within your Inbox it now shows the name of your email provider.



For further information on this and other features within the inbox please click here

Fixes

- Self Bill no longer creates zero value self bills when no pay.
- Self Bill timesheets that already have a transfer batch are not overwritten with -1.
- Self-Bill - Primary key for table SelfBillInvoicesforPDF not unique now fixed.
- Video buttons now work when expanding Placements and looking through them from Timesheets.
- Shift and Timesheet questionnaire now obeys department.
- When right clicking to select ‘all’ on the notify temp column when confirming shifts it now ticks the correct column.
- There used to be an error when accessing a second departmental questionnaire box after adding a question, but this has been fixed, allowing you to open multiple departmental questionnaire pages.
- When creating an ICS calendar appointment the duration specified is now obeyed.
- Division access obeyed on consultant pick lists even if not default division.
- Primary key fixed in table SelfBillInvoicesforPDF.
- When changing invoice companies the changes are now forced down.
- There was an issue with linking 2 documents to a timesheet where you could not view both of them, this has been resolved with no issues linking them.
- Issue with Composite Company Template fields not clearing if new template selected has been fixed.
- Fixed issue with ‘Original’ button bar where the custom button titles weren’t showing and the Staff Notes button was in the wrong place.
- If Person Source is ticked as being an audited item it now shows in the audit trail of the person record.
- Server port is now correctly reset after a disconnect/reconnect.
- Composite Company Template details not changing when moving from one to another has been fixed.
- Jobs set on a schedule in Anywhere to send a notification pick up global documents again.
- JPEG files can again be attached as extra documents on timesheets.

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