



How to Add a New Candidate Record

There are a few different ways you can add a new candidate.

Using the NEW button on the Person Selector

Click on the People icon on the toolbar to open the selector form.

Click on the New button, this will open the Person Details wizard to be completed.

New Applicant

Register Applicant

You can populate data fields by highlighting items and right-clicking the mouse

Enter Applicant details

Division: The Agency

☒ Name

- Surname
- Forenames
- Full Name
- Salutation
- Keyname
- State
- Available From

Pre registration

☒ Personal

- Gender
- Payroll Title
- Date of Birth
- NI Number
- Home Phone
- Day Phone
- Mobile
- E-mail
- Payroll Email ...

☒ Address

- Address
- Town
- County
- Country

[Parse CV](#)

< Back Next > Cancel

NB from version 2.2.10.16 there is a LOAD CV button available when adding a new candidate. This will allow you to browse to relevant folder and load CV from word and parse details etc.

You cannot edit the lines that are in grey, as they will be generated from items entered in the expanded group of fields. Move to the next line by tabbing, this will auto-fill fields. The information that you are asked for depends on what has been requested and set up by your company, but should include all of the following:

Name	This will be generated as you enter the names in the Surname & Forename fields.
------	---



Surname	Candidate's surname.
Forenames	Candidate's forename.
Full Name	This is generated from the names that you enter.
Salutation	This is generated from the names that you enter. It is used for letters and e-mails, ie. Dear <Salutation>. You can overwrite this field to show their 'nickname'
Keyname	This is generated from the names that you enter. It can be edited, e.g. put in spaces.
State	This will default to Agency initial applicant state setting.
Consultant	Select a name from the drop down list.
Registered	This is set to today's date
Number	This is the candidate's number that is generated by IQX. It is initially empty until the wizard is finished.

Once you have entered all the key information, click on the Next button.

Work through each screen entering all the relevant information that you have on each.

General Questionnaire

Payroll Information

Registering with a Department

Perm/Temp Employment (Note you must select at least one of these employment types)

Register to a Temp Desk if relevant

Department Questionnaire

Adding a Person from a CV



Open the CV in Word and use the  macro button that should be installed on your PC by your Agency. For Word Versions before 2007 the IQX Icon will show on the menu bar on the right. For Word Versions after 2007 there will be an extra Menu item called Add-Ins and the IQX Icon will be in that view.

OR drag and drop the CV from desktop into a blank area of IQX.

When using the macro button or drag and drop method, the Person Wizard will be opened with the CV in plain text on the left panel. You can then click on the Parse CV button underneath the CV text and this will auto populate the main fields with the relevant information. **NB From IQX Version 2.2.10.15** there is a Clear Parse button.



New Applicant

Register Applicant

You can populate data fields by highlighting items and right-clicking the mouse

Enter Applicant details

Division: **Town Industrial**

☒ **Name**

Surname: **Kirkup**

Forenames: **Barbara**

Full Name: **Barbara Kirkup**

Salutation: **KIRKUP BARBARA**

Keyname: **Pre registration**

State: **Pre registration**

Available From: **37**

☒ **Personal**

Gender: **37**

Payroll Title: **37**

Date of Birth: **01/01/1975**

NI Number: **01835 340 034**

Home Phone: **07777 777 777**

Day Phone: **barbara@byonder.co.uk**

Mobile: **barbara@byonder.co.uk**

E-mail: **barbara@byonder.co.uk**

Payroll Email ...

☒ **Address**

Address: **10 The Drive, Atown, Edinburgh, EH1 2AB**

Address: **10 The Drive**

Address: **Atown**

Town: **Edinburgh**

County: **Edinburgh**

Country: **Edinburgh**

Parse CV **< Back** **Next >** **Cancel**

Barbara Kirkup
10 The Drive,
Atown
Edinburgh,
EH1 2AB
Phone 01835 340 034
Mobile 07777 777 777
E-mail barbara@byonder.co.uk
date of birth
01/01/1975
resides
Edinburgh
experience 1998-1999 A Company
I was initially employed as a general carpenter, I was then asked to become
general foreman based on my all round knowledge of construction, my duties
included measurement from site and drawings, scheduling works on site,
organizing both sub contract and direct labourforce, setting out of works, and
basic health and safety plans. This was involved in mainly in hospital and
school repairs and re fits of various sizes and costs.

1999 - 2000 B Company
I was employed as a foreman carpenter to work on the new British Embassy
in Moscow, main duties were working in the secure areas of the embassy,
organizing labour within the secure area, liaising with the management team
outside the secure units, site measurements, quality control which had to be
extremely high, reporting of daily/weekly work schedules, implementing health
and safety plans.
From this position I gained invaluable experience in man management in
dealing with general work force and within the managerial team, this was my
first role in administration and of a very high class of quality control of
materials and finished product.

Populate other fields by highlighting the text on the CV, right clicking the mouse and selecting the destination field.

The following fields can be populated in this way - Surname, Forenames, Full Name, Salutation, Postcode, Country, County, Town, Rest of the address, Date of Birth, Gender, Home Phone, Day Phone, Mobile and e-mail.



New Applicant

Register Applicant

You can populate data fields by highlighting items and right-clicking the mouse

Barbara Kirkup
10 The Drive,
Atown
Edinburgh,
EH1 2AB
Phone 01835 340 034
Mobile 07777 777 777
E-mail barba...

date of birth ✓ Surname: Kirkup
01/01/1975 ✓ Forenames: Barbara
resides ✓ Full Name: Barbara Kirkup
Edinburgh ✓ Salutation: Barbara
experience ✓ Postcode: EH1 2AB
I was initially ✓ Country:
general fore ✓ County:
included me ✓ Town: Edinburgh
organizing b ✓ Rest of Address: 10 The Drive, Atown
basic health ✓ Date of Birth: 01/01/1975
school repair ✓ Gender:
1999 - 2000 ✓ Home Phone: 01835 340 034
I was emplo ✓ Day Phone:
in Moscow, ✓ Mobile: 07777 777 777
organizing le ✓ E-mail:
outside the ✓
extremely hi ✓
and safety p ✓
From this po ✓
dealing with ✓
first role in a ✓
materials an ✓

Register Applicant

Enter Applicant details

Division Town Industrial

☐ Name Barbara Kirkup

Surname Kirkup

Forenames Barbara

Full Name Barbara Kirkup

Salutation Barbara

Keyname KIRKUP BARBARA

State Pre registration

Available From

☐ Personal 37

Gender

Payroll Title

Date of Birth 01/01/1975

NI Number

Home Phone 01835 340 034

Day Phone

Mobile 07777 777 777

E-mail

Payroll Email ...

☐ Address 10 The Drive, Atown, Edinburgh, EH1 2AB

Address 10 The Drive
Atown

Town Edinburgh

County

Country

< Back Next > Cancel

The right hand side will show the data as it is added.
Thereafter use the Next button and work through the wizard as usual.
You will have the CV on display to help fill in the Questionnaires.

Back to [Getting Started](#)

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

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=quick_guides_2&rev=1410260163

Last update: **2017/11/16 21:57**

