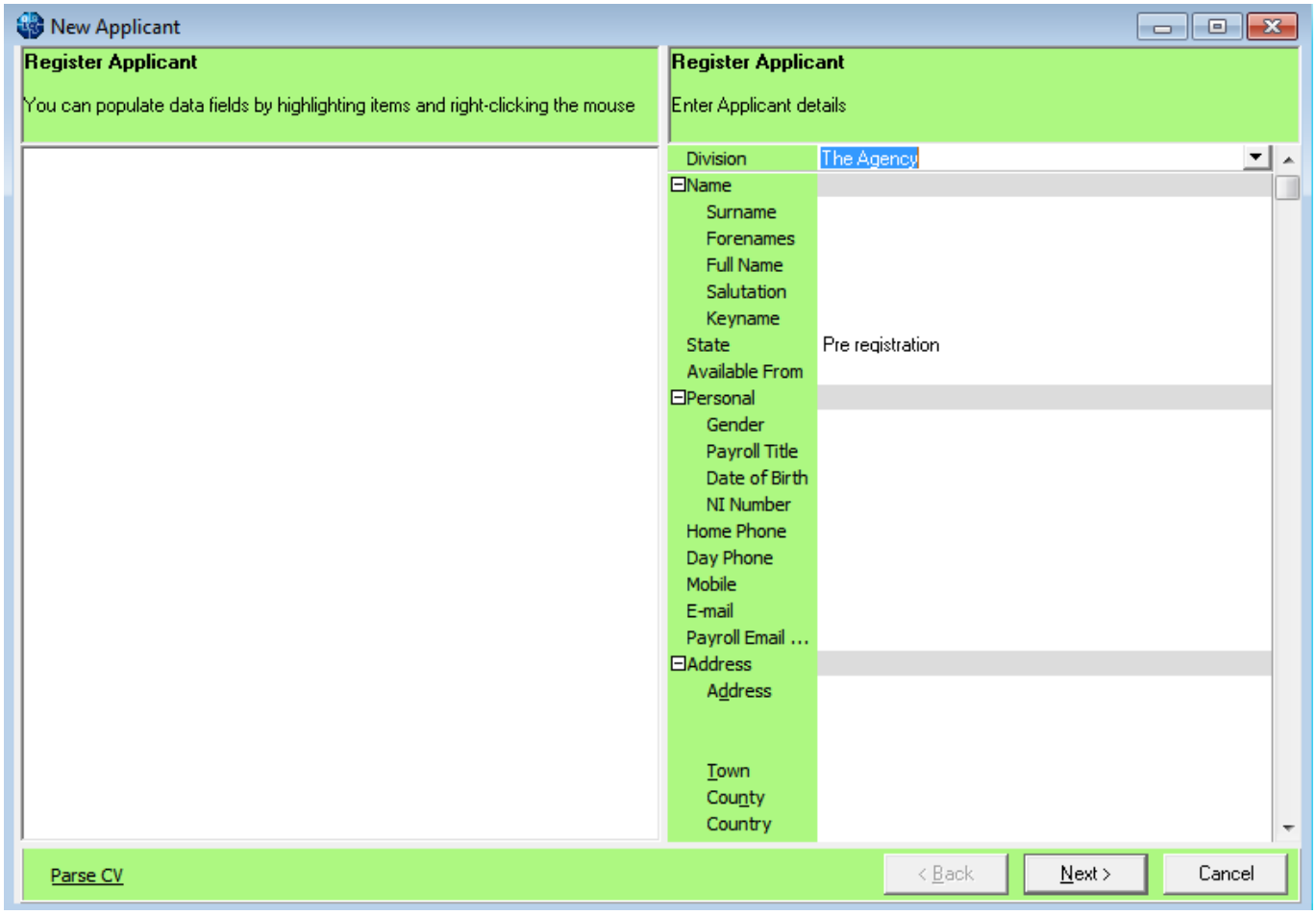
How to Add a New Candidate Record

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.



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. If you have started the registration from an open CV using the macro the CV will be loaded, ready for parsing.

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 frm the names that you eenter. 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.
Personal	Gender, Date of Birth and NI Number are required for payroll
Marketing	If the person has agreed to Marketing change to Subscribed
Consultant	Defaults to User entering. Select a name from the drop down list if to be changed.
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.

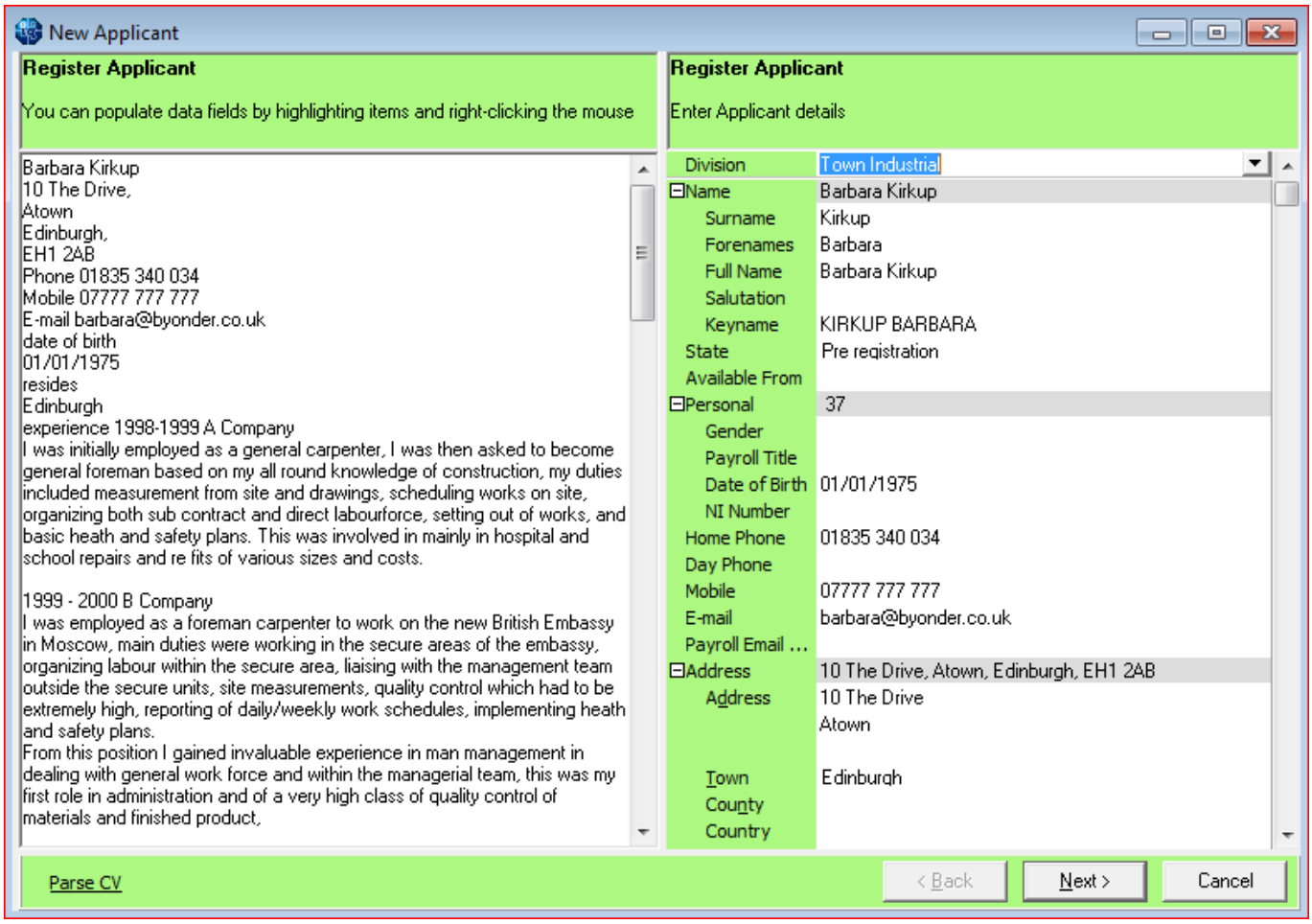
Work through each screen entering all the relevant information that you have on each.
General Questionnaire
Payroll Information
Registering with a Department
Perm/Temp Employment (Note you must select at least one of these employment types)
Register to a Temp Desk if relevant
Department Questionnaire

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.

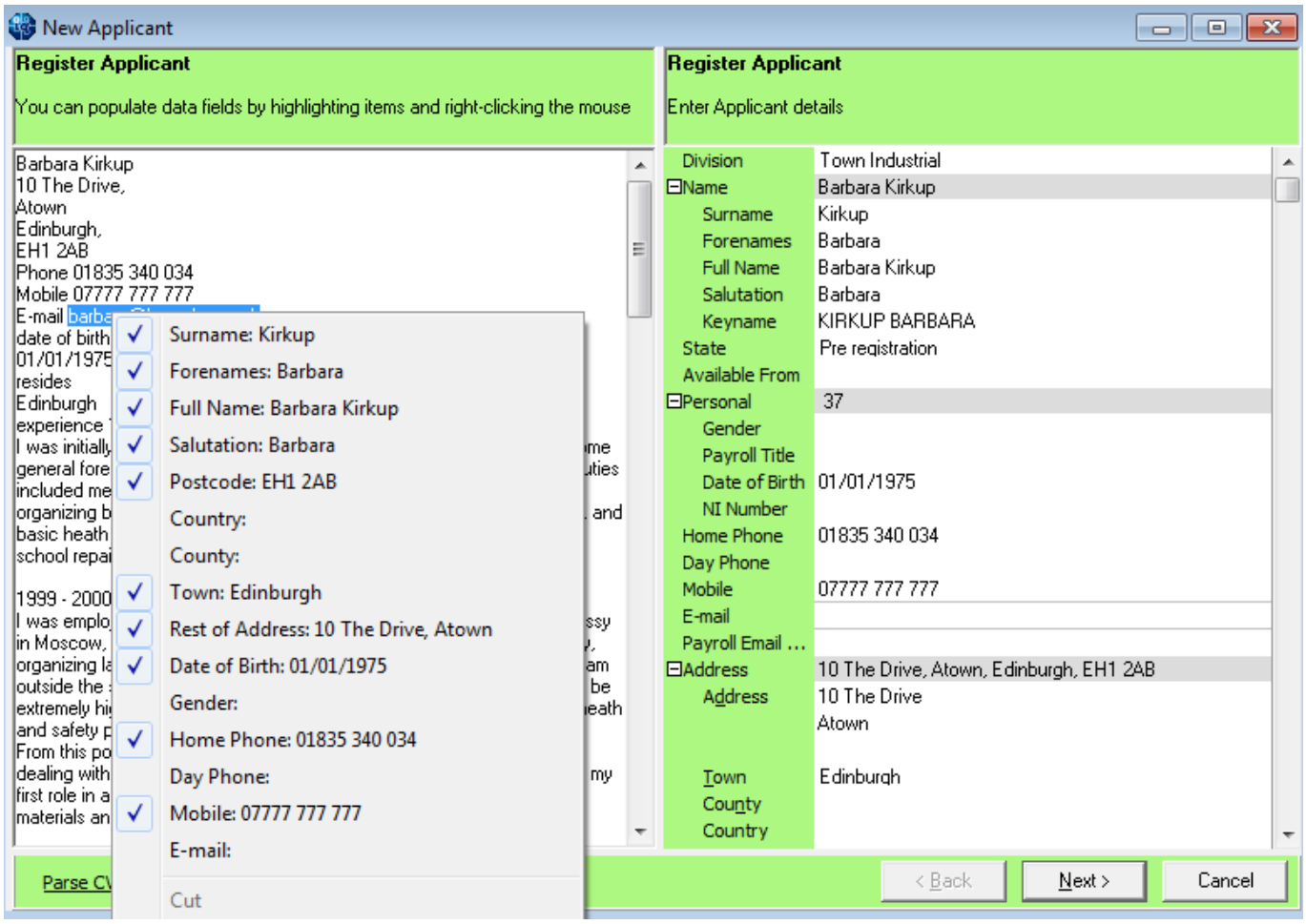
OR drag and drop the CV from desktop into a blank area of IQX.

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. There is a Clear Parse button if the data is unsuitable for parsing.



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.



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

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