



How to Configure Online Web Reference

1) To turn on the view in the Candidate Record: Go to General Settings > **Show Person On-line Reference View** > Set this to **Y**

and ensure **Person Reference Request** is set to **N**. you will now see this on the Candidate Record

The screenshot shows the 'Hari Tate' candidate record form. On the left-hand menu, the 'Online Reference' option is highlighted with a red arrow. The main form area displays various fields for the candidate, including 'Division' (BR Derby), 'Name' (Hari Tate), 'State' (Current), 'Available From', 'Home Phone', 'Day Phone', 'Mobile' (07777777777), 'E-mail' (Hari_Tate@iqxdemo.co.uk), 'Social Media', 'Headline' (Currently Placed at: Associates in Advertising Ltd), 'Alert', 'Reg. Departments' (Catering (Perm+Temp)), 'Dept. Questionnaire' (Catering), 'Key Skills', 'ROLE', 'SSSC Status', 'Renewal date', 'SSSC Expiry date', 'do u have uk passport', and 'RTW Expiry'.

2) You will need to set up Questions so when the form is sent to the Referee they can answer the Questions. Questions for References are Departmental therefore are found in Maintenance > Agency Setup > Departments > Questionnaire - Reference

The screenshot shows the 'Maintenance - Agency Setup' screen. The 'Departments' tab is selected, and the 'Reference' column is highlighted with a red arrow. The table displays various departments and their associated reference questions.

ID	Department	Searchable	Division	Reference	Analysis Code	Publish To Web	Sort Order	Show Extra Notes	SMTP Profile
10	Industrial	☒		N1		☒	60	☐	

The Questions are grouped so you can have specific Questions for each type of reference and options on who can see it.

- 0 Everyone to see
- 1 For Personal Reference - Candidate Answers
- 2 For Professional Reference - Candidate Answers
- 3 For Other Reference - Candidate Answers



100 For Personal Reference - Referee Answers
200 For Professional Reference - Referee Answers
300 For Other Reference - Referee Answers



Make sure for Candidate and Referee Questions Publish to Web is ticked

The screenshot shows the 'Questionnaire Maintenance' window for the 'Reference Questionnaire for Healthcare Department (RNU)'. It features a table of questions with columns for Order, Question ID, Question Description, Type, Min Step Size, Units, Required, Group, Audit, Web Publish, Web View, Search Hide, Heading Collapse, Heading Answers, and Export. A red box highlights the 'Add' button and the 'Group' column. Below the questions table, there are sections for 'Choices' and 'Sub Choices'.

Order	Question ID	Question Description	Type	Min Step Size	Units	Required	Group	Audit	Web Publish	Web View	Search Hide	Heading Collapse	Heading Answers	Export
10	CON	Did the candidate work at your company?	Single Selection			☐	200	☐	☒	☒	☐	☐	☐	☐
20	DC	Are the worked dated provided above correct?	Single Selection			☐	200	☐	☒	☒	☐	☐	☐	☐
30	REC	Do you have any comments to add?	Text			☐	200	☐	☒	☒	☐	☐	☐	☐
40	RE2	What job title is your referee?	Text			☐	2	☐	☒	☒	☐	☐	☐	☐
50	PR1	Please describe your relationship to the candidate	Text			☐	100	☐	☒	☒	☐	☐	☐	☐
60	PR2	Would you describe the candidate as dependable?	Single Selection			☐	100	☐	☒	☒	☐	☐	☐	☐
70	PR3	What relation is this person to you?	Text			☐	1	☐	☒	☒	☐	☐	☐	☐
80	OR1	Do they accept feedback without getting defensive	Single Selection			☐	300	☐	☒	☒	☐	☐	☐	☐

3) To send the Reference to the Referee you need the job IQXWeb Web Referencing (Send References).xml

This will pick up all the references which have not been sent and 'Approve to Send' within the Reference has been ticked

The screenshot shows the 'Reference Request for Hari Tate from John Adams at IQX Limited' form. It contains fields for Department, Reference Type, Referee Name, Organisation, Referee Job Title, Address, Contact Details, Job Title, Job Title Notes, Consultant, Created, Approved to Send, Ask Candidate Before Send, Sent to Referee, Reminder Blocked, Last Reminder, Completed by Referee, Process Completed, and Reference Refused. A red arrow points to the 'Approved to Send' checkbox, which is checked.

Department	Catering
Reference Type	Professional
Referee Name	John Adams
Organisation	IQX Limited
Referee Job Title	Managing Director
Address	
Contact Details	Email: support@iqx.co.uk
Job Title	Support Consultant
Job Title Notes	
Consultant	CATHERINE
Created	28/11/23 11:46
Approved to Send	☒
Ask Candidate Before Send	☐
Sent to Referee	☐
Reminder Blocked	☐
Last Reminder	
Completed by Referee	
Process Completed	
Reference Refused	

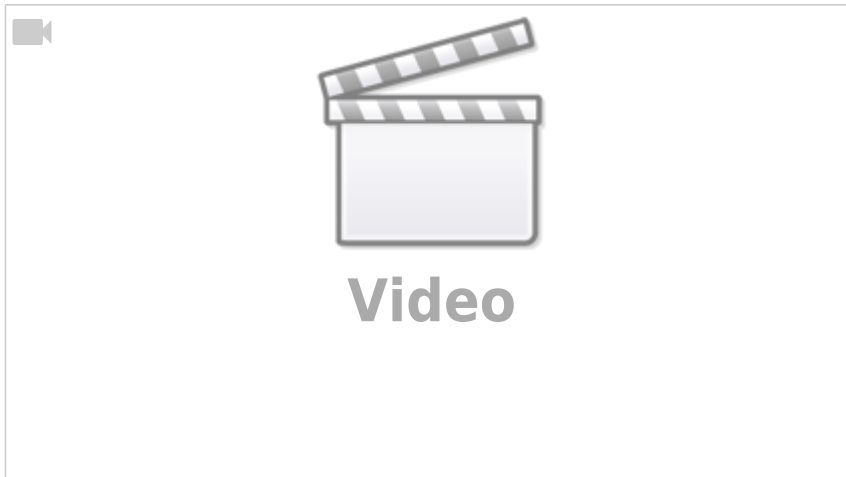


4) For the Email Body this is set up in Maintenance > Agency Setup > Email Signatures > the email signature **MUST** be called **WEBREF** and your body is written in HTML code with the below code required within the code for the Referee to access the Reference Form

```
<p><br></p>
<p><a href="{yourURL}/webReference/{URLRequestCode}" style="display: inline-block; color: #ffffff; background-color: #3498db; border: solid 1px #3498db; border-radius: 5px; box-sizing: border-box; cursor: pointer; text-decoration: none; font-size: 14px; font-weight: bold; margin: 0; padding: 12px 25px; text-transform: capitalize; border-color: #3498db;" target="_blank">Access Reference Request</a>&nbsp;</p>
<p><br></p>
```

How to create references can be found below

[Creating References](#)



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Last update: **2023/11/28 13:27**

