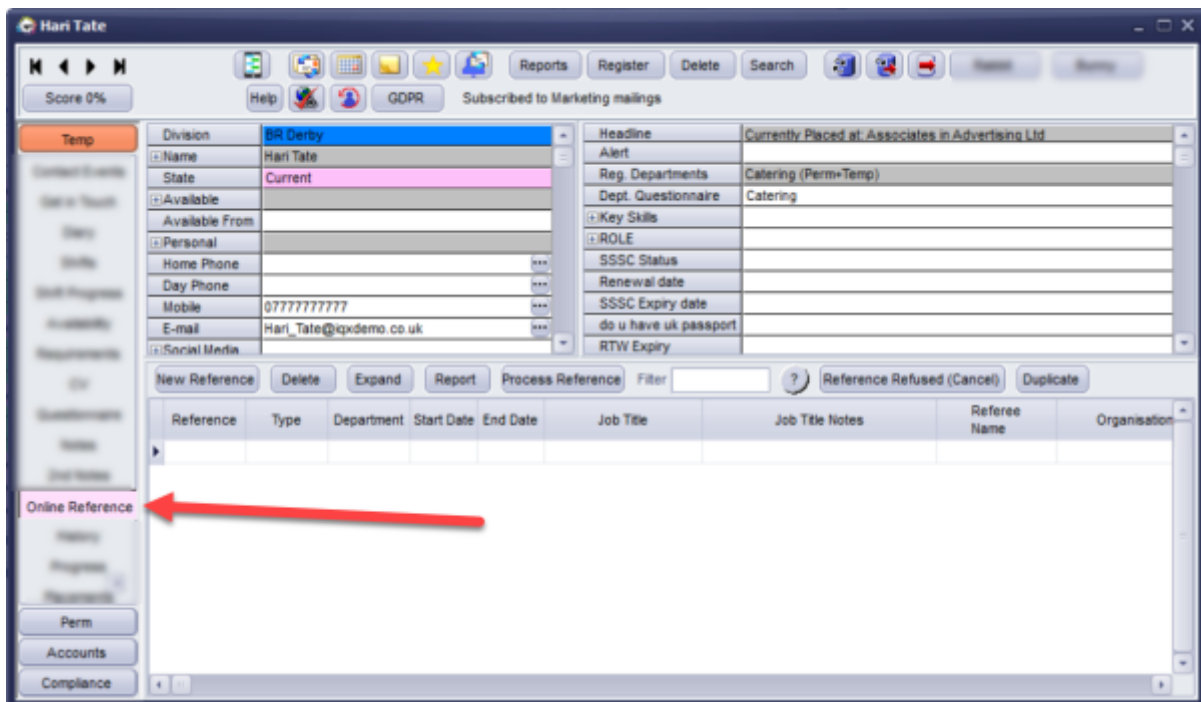




WORK IN PROGRESS

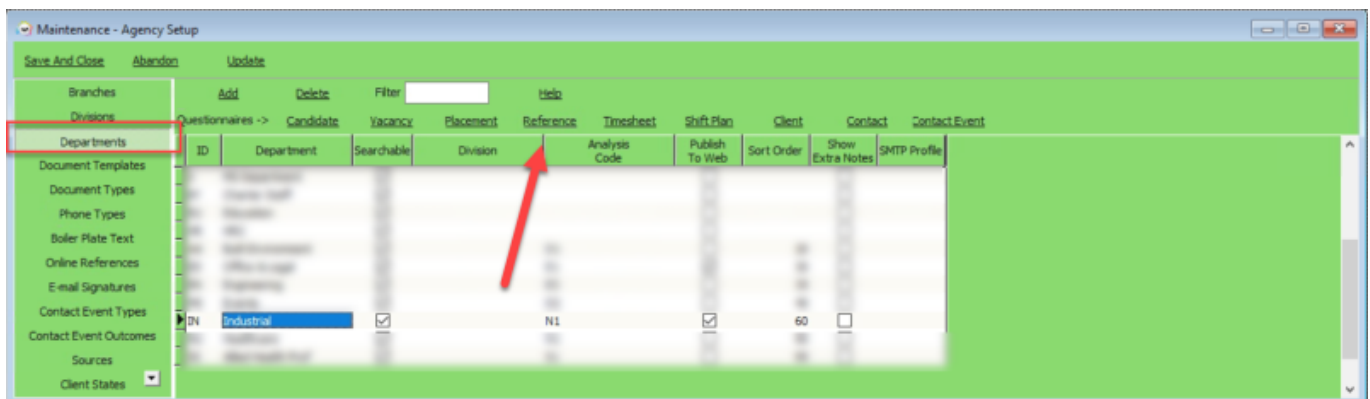
How to Configure Online Web Reference

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. The left sidebar contains various sections: Temp, Contact Events, Set a Task, Skills, Job Progress, Availability, Responsibility, Qualifications, Notes, Job Notes, Online Reference (highlighted with a red arrow), History, Progress, Recruitment, Perm, Accounts, and Compliance. The main form area displays details for 'Hari Tate' in the 'BR Derby' division, including contact information and a list of references.

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' window. The left sidebar lists various setup categories: Branches, Departments (highlighted with a red box), Document Templates, Document Types, Phone Types, Boiler Plate Text, Online References, E-mail Signatures, Contact Event Types, Contact Event Outcomes, Sources, and Client States. The main area displays a table of questions for different reference types. The 'Reference' tab is selected, and a red arrow points to the 'Reference' column header.

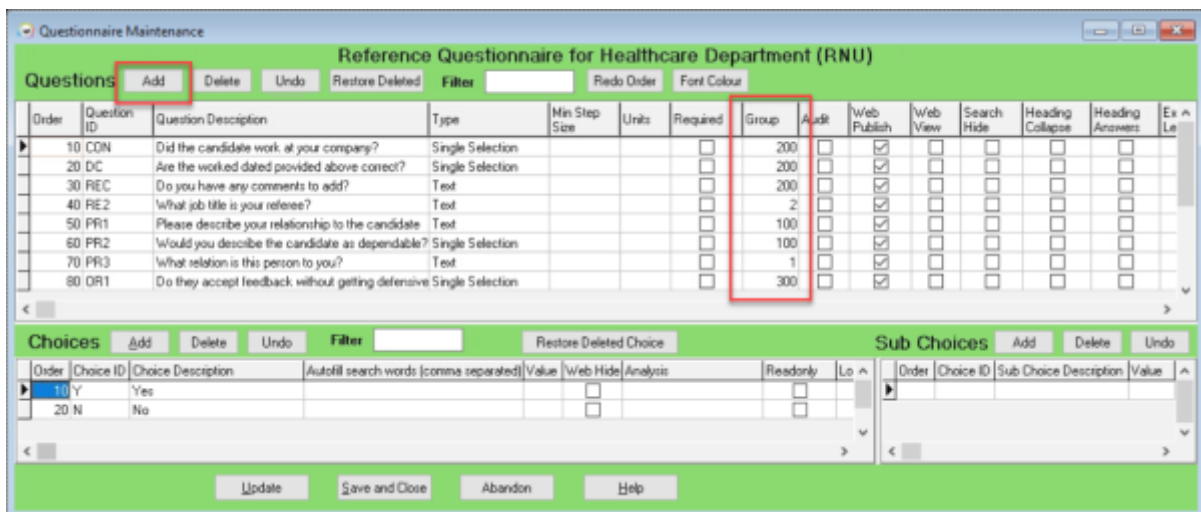
Questionnaires ->	Candidate	Vacancy	Placement	Reference	Timesheet	Shift Plan	Client	Contact	Contact Event
ID	Department	Searchable	Division	Analysis Code	Publish To Web	Sort Order	Show Extra Notes	SMTP Profile	
01	Industrial	☒		N1	☒	60	☐		

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

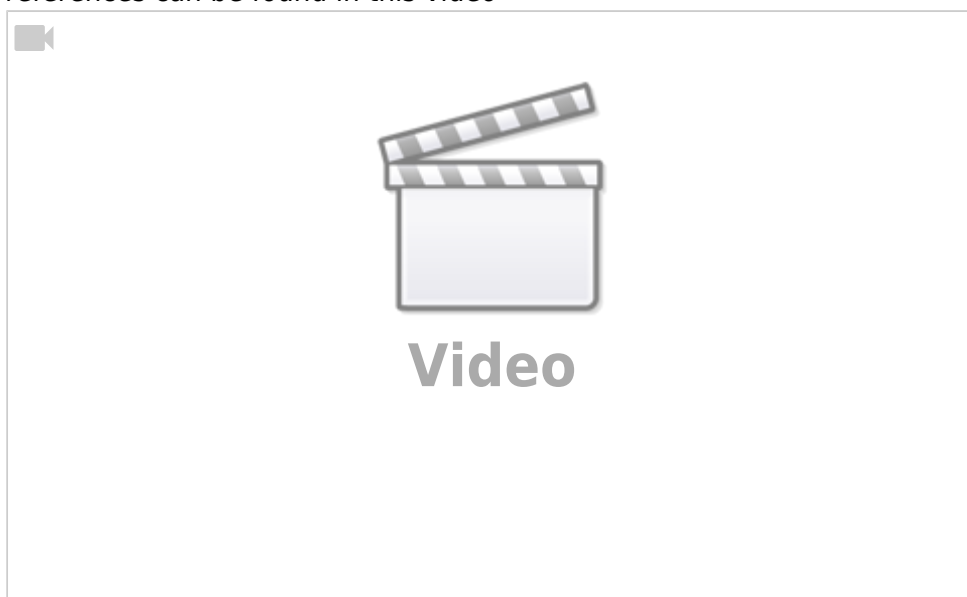
0 Everyone to see
1 For Personal Reference - Candidate Answers
2 For Professional Reference - Candidate Answers
3 For Other Reference - Candidate Answers
100 For Personal Reference - Referee Answers
200 For Professional Reference - Referee Answers
300 For Other Reference - Referee Answers



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



How to create references can be found in this video



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

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	

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Last update: **2023/11/28 11:48**

