# Add a New Candidate

**Refers to:**
People (Top menu)

To add a new candidate to IQX:

- Click on the People icon on the toolbar to open the selector.
- Click on the **New** button.
- This will take you to the first screen of the Person Details wizard which you need to complete. There are some fields that you must fill and others that are optional.
- Click on the **+** button to expand a section and enter the candidate's personal details.

| **Keystroke** | **Use** |
|---|---|
| Tab or Return | Moves you through the questions, expanding each level |
| Up and Down arrows | Moves you through the questions without expanding levels. |
| Left and Right arrows | Collapses or expands a level, unless it is a text field |
| Space Bar | Ticks or Clears a check box (tick box) |
| Alt + Down arrow | Opens a drop down selection. Enter Selects |
| Alt + Up arrow | Goes to top of questionnaire |
| Ctrl + character | In a long list, this takes you to the next word that starts with that character |

**Note:** You cannot edit the lines that are in grey, as they are generated from items entered in the expanded group of fields.

The information that you are asked for depends on what has been requested by your company, but should include some or all of the following:

| | |
|---|---|
| Name | This will generated from the names that you enter in the Surname and Forenames fields. |
| Surname | The candidate's surname. |
| Forenames | The candidate's forenames. |
| 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, i.e. Dear <Salutation>, not the candidate's title. |
| Keyname | This is generated from the names that you enter.You can edit this to reflect the way that the company works, e.g. put in spaces. |
| State | Select an item from the drop down list.The default is Current, and you should not normally need to change this. |
| Consultant | You can change this by selecting another 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. Initially it is empty. **(2.16.4+)** Candidate record registration numbers can be made read only and will be displayed in grey. |
| Date | This is set to today's date. |
| Personal | This is generated from the options you choose in the expanded fields. |

| | |
|---|---|
| Gender | Select Male or Female from the drop down list. |
| Date of Birth | The candidate's date of birth. |
| Home Phone | The candidate's home phone number. |
| Mobile Phone | The candidate's mobile phone number. |
| E-mail | The candidate's e-mail address. |
| Address | This is generated from the entries you make in the expanded fields. |
| Address | First line of candidate's address. |
| Town | Name of town. |
| County | Name of county. |
| Country | Name of country. |
| Postcode | Postcode. You must enter this. |
| Last Updated | The date that this candidate's details were last updated. When you first add a new candidate this field remains empty. |

When you have entered all the information, click on the **Next** button.
You now need to complete the General Questionnaire. Click on the **+** button to expand a section and enter the relevant details. The information that you are asked for depends on what has been requested by your agency. For example, you may be asked for information on language skills, driving ability, nationality, visa expiry date, education and professional qualifications. When you have entered all the information, click on the **Next** button.

**Note:** The departments listed are those that have been set up for your agency. On this screen, select the relevant department for the candidate, and then click on the **Next** button.

Click on the **Permanent** or **Temp** box to indicate the type of work that the candidate requires, and then click on the **Next** button. **Caution:** You must tick at least one of these boxes. If you leave them both blank, then the candidate is not registered with the department. You can **register the candidate** with one or more Temp Desks by ticking the boxes in the Pool column. When you have selected the relevant Temp Desks, click on the **Next** button.

You now need to complete the department questionnaire. The questions that you see depend on the department that you chose. If the majority of the questions are not relevant for your candidate, you may have selected the wrong department. You can use the **Back** button to go back and change the department.

To **complete the questionnaire**:

- Click on the **+** or click in the row and press the right arrow key or Return to expand the questions. Press the left arrow key to contract the question.
- Click on the relevant boxes to give details of the candidate's previous work. Press the Spacebar to toggle the tick on and off in a tick box.
- When you have finished, click on the Finish button.

You should then see a screen that displays the candidate's details.

At the top of this screen there are some buttons that you use as follows:

| Button | Function |
|---|---|
| Reports | Run any of the person selector reports for the current candidate. |
| Register | Open the wizard to register or update the candidate with departments. You can only register a candidate with a department using the Register button. |
| Search | Open the wizard to look for a suitable vacancy for the current candidate. |
| Delete | Delete a record if there are no links such as Contact Events or Progress. To effectively remove a person but retain them for history, you should change their state to Deleted/Archived. |
| Help | Open the help page with guidance on the fields on this screen. |

You can view different information by clicking on an option on the left side of the screen.

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