

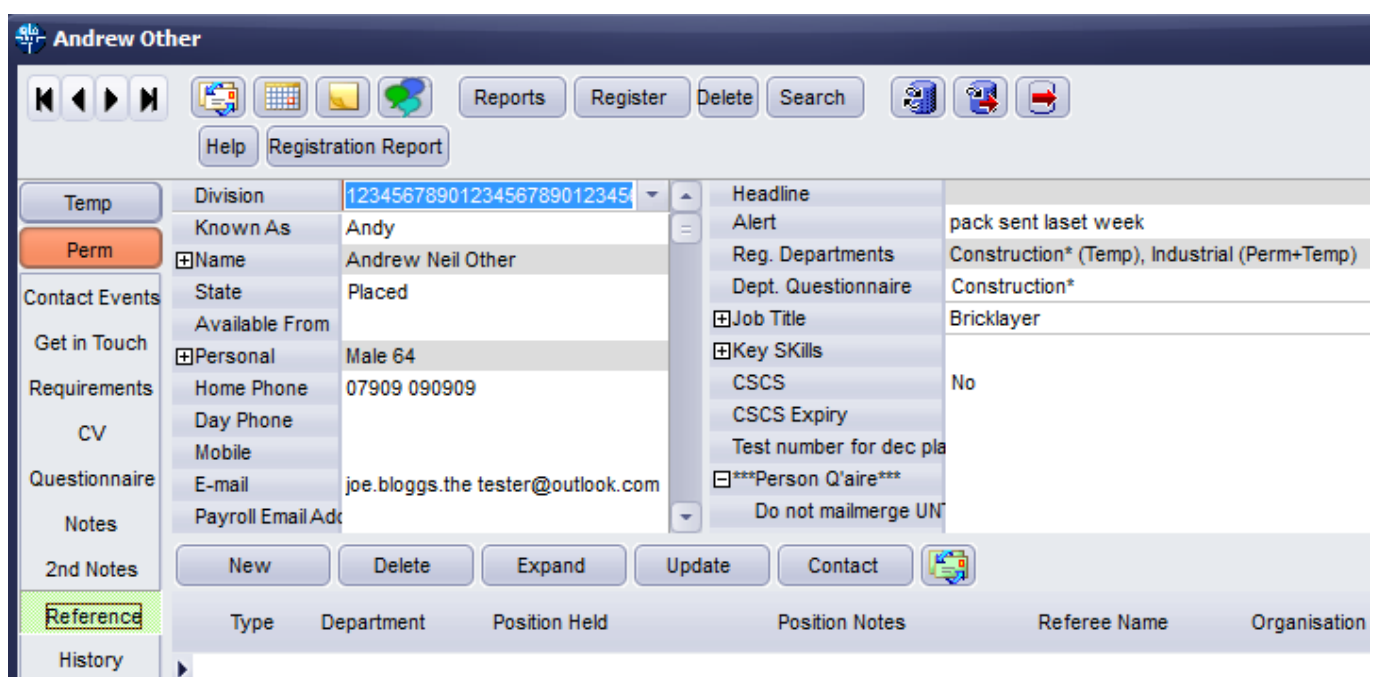


# WORK IN PROGRESS

## References

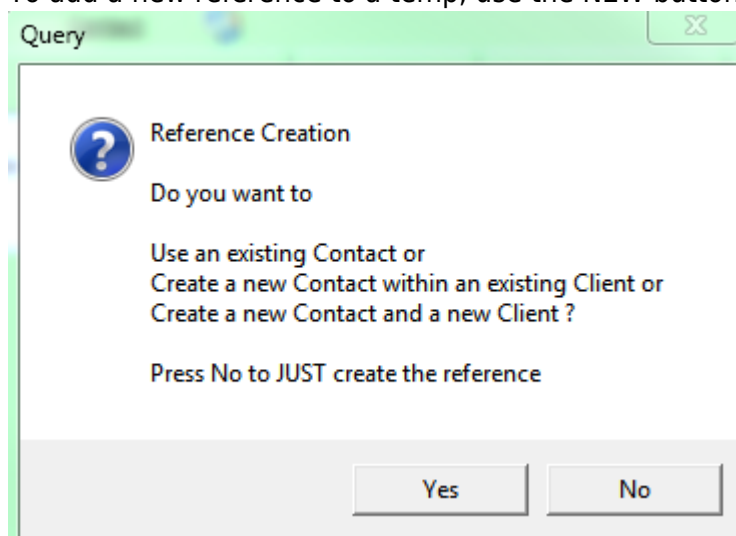
### USE

You will now see a new screen on the person form called Reference:



The screenshot shows the 'Andrew Other' person form. The 'Reference' tab is selected in the left-hand menu. The main area displays a table with columns: Type, Department, Position Held, Position Notes, Referee Name, and Organisation. The table is currently empty. Above the table, there are buttons for 'New', 'Delete', 'Expand', 'Update', and 'Contact'. The top of the form includes navigation icons, a 'Help' button, and a 'Registration Report' button. The top right corner has buttons for 'Reports', 'Register', 'Delete', and 'Search'. The top left corner has a 'Temp' button and a 'Perm' button. The top middle section contains a 'Division' dropdown menu with the value '1234567890123456789012345'. Below this are fields for 'Known As' (Andy), 'Name' (Andrew Neil Other), 'State' (Placed), 'Available From', 'Personal' (Male 64), 'Home Phone' (07909 090909), 'Day Phone', 'Mobile', 'E-mail' (joe.bloggs.the tester@outlook.com), and 'Payroll Email Address'. The right-hand side of the form contains a 'Headline' field (pack sent laset week), an 'Alert' field (Construction\* (Temp), Industrial (Perm+Temp)), a 'Reg. Departments' field (Construction\*), a 'Dept. Questionnaire' field (Bricklayer), a 'Job Title' field (Bricklayer), a 'Key Skills' field (CSCS), a 'CSCS Expiry' field (No), a 'Test number for dec pla' field, and a '\*\*\*Person Q'aire\*\*\*' field (Do not mailmerge UN).

To add a new reference to a temp, use the NEW button. You will be given the following options.



The screenshot shows a 'Query' dialog box titled 'Reference Creation'. It contains a question mark icon and the text: 'Do you want to Use an existing Contact or Create a new Contact within an existing Client or Create a new Contact and a new Client ? Press No to JUST create the reference'. At the bottom, there are 'Yes' and 'No' buttons.

- Clicking **yes** will allow you to search for contacts already existing in the database so you can attach the reference request to a client. You will be able to then add the contact against an



existing client or add a new client if they are not already in the database.

- Clicking **no** will allow you to add the reference line without linking it to any records (for a reference request from someone who is not a client or potential client for example.)

If you click **yes** then search for the company and select the contact that is to be the referee.

| Company               | Address        | County | Town    |
|-----------------------|----------------|--------|---------|
| Barden Primary School | Burnely Campus |        | Burnley |

| Name               | Position            | Status     |
|--------------------|---------------------|------------|
| Miss Joyce D'Costa | Deputy Head Teacher | Perm Place |
| Mrs Lorraine Hale  | Deputy Head Teacher | Perm Place |
| Sarah Jakes        |                     | Client     |
| Mrs Saira Khan     | Deputy Head Teacher | Perm Place |

Select the company or **add** a new company. Then select or **add** the contact against the company.

This will bring up the reference form.

If you clicked **no** to create just a reference you will be taken straight to this form.



| Reference Request for                    |                                   |
|------------------------------------------|-----------------------------------|
| Send Event                               | References                        |
| Type                                     | Professional                      |
| Department                               | Education                         |
| <input type="checkbox"/> Referee         | Miss Joyce D'Costa (Miss D'Costa) |
| Referee Name                             | Miss Joyce D'Costa                |
| Salutation                               | Miss D'Costa                      |
| Organisation                             | Barden Primary School             |
| Client Contact                           | Yes                               |
| Referee Job ...                          | Deputy Head Teacher               |
| Keyname                                  | D'COSTA, JOYCE                    |
| <input type="checkbox"/> Address         | Burnely Campus, BB10 1JD          |
| Address                                  | Burnely Campus                    |
| Town                                     |                                   |
| County                                   |                                   |
| Country                                  |                                   |
| PostCode                                 | BB10 1JD                          |
| Home Phone                               |                                   |
| <input type="checkbox"/> Contact Details | Email: test@iqx.co.uk             |
| Work Phone                               |                                   |
| Mobile Phone                             |                                   |
| Fax                                      |                                   |
| Email                                    | test@iqx.co.uk                    |
| Job Title                                | Teaching Assistant                |
| Job Title Notes                          |                                   |
| Consultant                               | BARBARA                           |
| <div>&lt; Back Finish Cancel</div>       |                                   |

Fill in the required fields and finish. This will open the Contact Event to send the reference; make sure the correct type is selected and then complete your email using insert text if boiler plate text has been set up and **send email**.

The referee will now appear on the reference screen for that candidate. The date that they were created and when the Contact Event to the referee was created are filled automatically. The process date and consultant fields track the progress stages of the reference.



Mr David Agar

Help Registration Report

Temp Division **Teacher Clearance** Headline Alert pack sent monday last week not returned

Contact Events Division David Agar Reg. Departments Education (Perm+Temp)

Get in Touch State Registered Dept. Questionnaire Education

Available From Personal Male 55 Age Range will Teach

Diary Home Phone 01642595595 Job Description Teacher

Shifts Day Phone 07789641330 Work Area Secondary Middle

Shift Progress Mobile E-mail Trained as

Availability Address 12 Moorberries, Hilton, Yarn, Cle... Transport

Requirements Consultant MIDDLE Scale Rate M2

CV Consultant N/A 11R Main Subject HUMANITIES

Questionnaire Notes Other Subjects Historv. Geographv

| Type         | Department         | Job Title                 | Job Title Notes        | Referee Name    | Organisation              | Client Contact | Consultant | Reference Created | Contact Event to Referee | Reference Returned | Completed | Processed Date | Processed By |
|--------------|--------------------|---------------------------|------------------------|-----------------|---------------------------|----------------|------------|-------------------|--------------------------|--------------------|-----------|----------------|--------------|
| Professional | Education          | Admin                     | add some notes here... | Barbara Kirkup  | Alfred Barrow School      | Yes            | BARBARA    | 12/02/13 12:40    | 12/02/13                 | 12/02/13           | 12/02/13  | 12/02/13       | BARBARA      |
| Professional | Registrations test |                           |                        | Helen Todd      | Lillesleal Primary School | Yes            | BARBARA    | 12/02/13 12:42    | 12/02/13                 |                    |           | 12/02/13       | BARBARA      |
| Reference    | Personal           | Registrations Floor Staff |                        | Richard Johnson | RJ & Sons                 | Yes            | BARBARA    | 12/02/13 12:46    | 12/02/13                 | 12/02/13           |           | 12/02/13       | BARBARA      |
| History      | Personal           | Education Student         |                        | Jane Sorens     | none                      |                | BARBARA    | 12/02/13 12:48    |                          |                    |           |                |              |

Once a reference has been returned, from your Desktop Inbox save it to the documents on the relevant records, and save the email as a contact event. See also [SAVING AN ATTACHMENT FROM AN EMAIL IN THE INBOX TO THE DOCUMENTS VIEW OF A RECORD](#).

Enter the date into the Reference Returned column. Once the reference has been checked and completed, enter the completed date on the reference screen.

Further references can be added by repeating the steps. Once a reference request has been sent the record cannot be deleted.

Reference lines that have been created but are awaiting a request to be sent are coloured green.

Lines where the reference has been sent or returned but not checked (completed) are black.

References that are completed are blue.

Search criteria can be added for references.

Each time a stage is completed (ie. a date is entered) the processed date and processed by fields are updated with the date and user details.

## Set up - for Systems Administrators

1. Create a contact event type - called Reference Request or something similar. Go to Maintenance, Agency Setup, Contact Event Types NEW.

Maintenance - Agency Setup

Save And Close Abandon Update

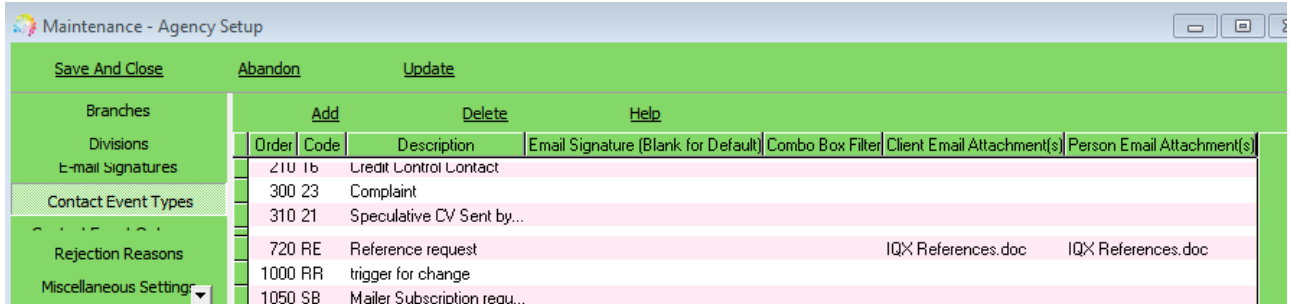
Branches Divisions Departments Document Templates Document Types Phone Types Boiler Plate Text E-mail Signatures Contact Event Types

| Order | Code | Description               | Email Signature (Blank for Default) | Combo Box Filter | Client Email Attachment(s) | Person En |
|-------|------|---------------------------|-------------------------------------|------------------|----------------------------|-----------|
| 1     | SB   | Subscription request sent |                                     |                  |                            |           |
| 5     | R1   | References                |                                     |                  | Reference request.doc      |           |
| 10    | 13   | TESTING                   |                                     |                  |                            |           |
| 15    | WD   | Work Offered              |                                     |                  |                            |           |
| 20    | AN   | Availability Notification |                                     | T                |                            |           |
| 25    | CS   | Client Service Call       |                                     | T                |                            |           |
| 30    | 03   | Client Visit              |                                     |                  |                            |           |
| 35    | 14   | Client Update             |                                     |                  |                            |           |
| 40    | 02   | Client re Vacancy         |                                     | T                |                            |           |
| 45    | C2   | Client Confirmation       |                                     | T                |                            |           |

2. If you wish to send a standard document out with the reference request, create the document and save it in the reports directory.



3. Link the document to the the Contact Event type by entering the full document filename in the client email attachment column (Agency Setup, Contact Event Types, Email Attachments.) Multiple attachments must be separated with a semi colon (;). Each time this contact event type is used to send an email it will attach the document(s).



| Maintenance - Agency Setup    |      |                             |                                     |                  |                            |                            |
|-------------------------------|------|-----------------------------|-------------------------------------|------------------|----------------------------|----------------------------|
| Save And Close Abandon Update |      |                             |                                     |                  |                            |                            |
| Add Delete Help               |      |                             |                                     |                  |                            |                            |
| Order                         | Code | Description                 | Email Signature (Blank for Default) | Combo Box Filter | Client Email Attachment(s) | Person Email Attachment(s) |
| 210                           | 1b   | Credit Control Contact      |                                     |                  |                            |                            |
| 300                           | 23   | Complaint                   |                                     |                  |                            |                            |
| 310                           | 21   | Speculative CV Sent by...   |                                     |                  |                            |                            |
| 720                           | RE   | Reference request           |                                     |                  | IQX References.doc         | IQX References.doc         |
| 1000                          | RR   | trigger for change          |                                     |                  |                            |                            |
| 1050                          | SB   | Mailer Subscription requ... |                                     |                  |                            |                            |

4. Create boiler plate text if you wish to have a standard email text to be used. Using the insert text on the contact event makes sending the request quicker. (Maintenance, Agency Setup, Boiler Plate Text, ADD). See also [Boiler Plate Text](#).
5. Finally switch on References for the database. General Settings, Switchable Views, 110 Person Reference Request Y.

Back to [Candidates. How to...](#)

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