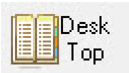
IQX booking consultant guide (shifts)

Desk Top

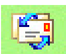


Check here every morning for work to be done.

- Daily work list: Combination of Diary, Contact Events for Callback and ShortList progress.
- Diary: Reminders and Appointments organised here.
- Inbox: Shows the Emails in the PC's inbox. Emails can be saved/replied to as Contact Events.
- Progress Due for Action: Short Listed Candidates with Action Dates to be worked on. F2 will start a linked CE. State can be changed and Action Date changed/deleted.
- Contact Events due for Callback: CEs that have been marked for Callback. F2 will start a continuation CE. Done clears the date from the callback field in the CE.
- Current Vacancies: State is current so to be worked on.
- Unauthorised Placements: Perm Placements waiting to be Authorised for Invoicing.

Desk Top - further information

Contact Events F2



A Contact Event (CE) can be made from anywhere a person link exists - a selector, record, temp desk, shift form - to initiate or record a letter, email or conversation ie. Availability or booking.

To link a CE to both candidate and client make the contact event from Confirm Shifts, from a Placement or Timesheet in the Temp Desk or from a Short List Progress form.

A new CE can be started from an existing one by using the contact event button, using F2 or you can duplicate the existing CE by using Duplicate button.

Candidate Availability

From Temp Desk>Temps or Person>Diary. Use the **Available** button. From Person>Availability use the Enter Availability button or right click on the day cell and enter.

On Temp Desk> Temps view, click on the column header (showing the days) to filter to Temps who have Availability entered for that day. Click again to clear the available filter.

Availability - further information

Enter Shifts

Temp Desk> Vacancies: Click Show: Current State, Select the Vacancy, **Add Shifts** opens the Bulk Add Shifts wizard. Use **CTRL + Add Shifts** for alternative shift adding view.

Vacancy> Diary: Click the **Add** button so it is yellow, select type and click on required days, then click **Add** again. Holding down **Shift** key while selecting opens the Bulk Add Shifts wizard.

Vacancy> Shifts: The **Add** button opens the Bulk Add Shifts wizard. *Use with CTRL for alternative add shifts view*

The shift templates may have a minimum Grade, Essential Primary Role and Time range associated with them to filter searches for Temps. Times can be altered and Order information entered.

Temp Desk> Shifts: shows all shifts - full details are in the lower part of the screen. Shifts are managed individually here.

Adding shifts - further information

Fill Shifts

Vacancy and Temp Desk: **Fill Shifts** button opens the wizard.

- Page 1: Select where to Match from – and how many weeks to match – default is 1 - also if have previously worked for that Client.
- Add Criteria, if Filter Temps has been selected
- Select Candidate on left – Shifts how if Candidate is Available, Possibly Available, Booked or Not Qualified. Available results are at the top, least good matches at bottom.

Use F2 to make a Contact Event to telephone, use Outcomes to aid quick entry. Use Ctrl + Click to select Candidates to send Texts to and use Text Messages Button. Tick the shifts the Candidate can do. This will block this Candidate from other searches.

To Search for Shifts for a Temp, from a Temps record, use **Book Shifts** from Availability or **Book** from Diary.
NB *A candidate will not be available if already booked in an overlapping shift, Unavailable/Holiday has been entered, Withdrawn from the client in History or in an ongoing placement that is NOT ticked for Concurrent.*

Fill Shifts - further information

Confirm Shifts

Select or Expand the Vacancy, use the **Confirm Shifts** button, make a CE to contact other party, then tick if confirmed (or cancel shift if rejected).

Shifts are outlined in Royal Blue until both Client and Candidate have been Confirmed. The Confirmed colour is Dark Blue and the Worked (has a completed Timesheet) colour is Black.

Confirm Shifts - further information

Cancel Shifts

Use the **Confirm Shifts** button, tick the Cancel box and select a Cancel Reason. Make a CE to contact other party. From Person or Vacancy Diary right click on shift and Cancel.

Depending on the Cancel Reason used, another Unfilled shift can be automatically created.

Fill new shift, if required. For analysis purposes, cancel unfilled shifts. Do this once a week.

The Cancel Reason determines who has to be notified. The shift disappears from the record that caused the cancellation and is outlined in pink in the record still to be notified, until ticked as confirmed.

Mail Merge

Mail merge has to be to a Person or Client Contact. From IQX version 2.2.9.9 A mail merge can be filtered according to highlighted records on the selection.

If using an IQX version previous to this, then reduce the list by highlighting and making a stored selection then retrieve it and proceed. Create the mail merge in Word, then Print or activate E-mail or Fax distribution. If an E-mail address is not found then a hard copy will be printed for that person.

Mail Merge - further information

Leavers

In IQX complete and transfer the last timesheets, including any Holiday Pay timesheets.

Go to the Temp's record and change the state from Current to what is the appropriate state.

- Payroll: Click P45 Date and CAREFULLY go through the list of actions to take when ending an employment.

Temp Desk Weekly Checks

- Vacancies. Change the state of ended Vacancies from Current to Finished/Filled and end all attached Placements.
- Placements. Make sure all ended Placements have Leave Dates. Check over the Temps record.
- Timesheets. Chase up previous uncompleted provisional timesheets.
- Temps. Chase up Availability and enter.

See also
Temp Desk
Vacancy/booking