



How to Add a New Candidate Record

There are a few different ways you can add a new candidate.

Using the NEW button on the Person Selector

Click on the People icon on the toolbar to open the selector form.

Click on the New button, this will open the Person Details wizard to be completed.

The screenshot shows the 'New Applicant' window. The left pane is titled 'Register Applicant' and contains the instruction 'You can populate data fields by highlighting items and right-clicking the mouse'. The right pane is also titled 'Register Applicant' and contains the sub-header 'Enter Applicant details'. It lists various fields for data entry, including 'Division' (set to 'IQXHealthcare'), 'Known As', 'Name' (with sub-fields for Surname, Forenames, Full Name, and Keyname), 'State' (set to 'Pre registration'), 'Available', 'Available From', 'Personal' (with sub-fields for HMRC Gender, Payroll Title, Date of Birth, NI Number, Home Phone, Day Phone, Mobile, E-mail, Marketing, and Payroll Email Address), 'Address' (with sub-fields for Address, Town, County, Country, Postcode, and Source), and 'Source'. The 'Name' and 'Personal' sections are expanded, showing their sub-fields. At the bottom of the window, there are buttons for 'Parse CV', 'Load CV', '< Back', 'Next >', and 'Cancel'.

There is a LOAD CV button available when adding a new candidate. This will allow you to browse to relevant folder and load CV from word and parse details etc. If you have started the registration from an open CV using the macro the CV will be loaded, ready for parsing.

You cannot edit the lines that are in grey, as they will be generated from items entered in the expanded group of fields. Move to the next line by tabbing, this will auto-fill fields. The information that you are asked for depends on what has been requested and set up by your Agency, but should include all of the following:



Name	This will be generated as you enter the names in the Surname & Forename fields.
Surname	Candidate's surname.
Forenames	Candidate's forename.
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, ie. Dear <Salutation>. You can overwrite this field to show their 'nickname'
Keyname	This is generated from the names that you enter. It can be edited, e.g. put in spaces. <i>Note</i> If you change a candidate's surname for example because they have got married you will also need to update the keyname to ensure they can continue to be found.
State	This will default to Agency initial applicant state setting.
Personal	Gender, Date of Birth and NI Number are required for payroll
Marketing	If the person has agreed to Marketing change to Subscribed
Consultant	Defaults to User entering. Select a name from the drop down list if to be changed.
Registered	This is set to today's date
Number	This is the candidate's number that is generated by IQX. It is initially empty until the wizard is finished.

Once you have entered all the key information, click on the Next button.

The wizard is made up as follows but can be customised by each Agency to only include the pages that are relevant to you. For more information please contact IQX Support.

Main details	Name, Address, Phone and Email, Essential Information
General Questions	Universal data to be kept for the record.
Payroll Information	Tax Method and Details, Pay method and details. Optional if the Agency does not complete at initial stage.
Department	Defaults to the User's Department. This page is optional.
Perm and/or Temp	Defaults to tick if the User has the Perm and/or Temp roles. Optional.
Temp Desks	Defaults to all in the Divisions the User can see. Optional if the Agency does not assign Temp Desks until compliant.
Department Questions	Departmental specific data to be kept for the record.

Using the FAST NEW button on the Person Selector

If enabled by your Agency there will be a **Fast New** button on the person selector which opens a simplified version of the new person wizard which is a single page form.




Label	Value
Division	IQXHealthcare
Department	Health
Surname	
Forenames	
Full Name	
Keyname	
Known As	
State	Pre registration
Gender	
Date of Birth	
Home Phone	
Mobile	
E-mail	
Number	
Date	02/10/2020
Address	
Town	
County	
Country	
Postcode	

This single page registration form will enable consultants to quickly add records while the candidate is on the telephone ensuring the data is entered onto the system and can be found and searched for.

Adding a Person from a CV



Open the CV in Word and use the  macro button that should be installed on your PC by your Agency. For Word Versions before 2007 the IQX Icon will show on the menu bar on the right. For Word Versions after 2007 there will be an extra Menu item called Add-Ins and the IQX Icon will be in that view.

OR drag and drop the CV from desktop into a blank area of IQX (IQX can handle both word and pdf CVs).

When using the macro button or drag and drop method, the Person Wizard will be opened with the CV in plain text on the left panel. You can then click on the Parse CV button underneath the CV text and this will auto populate the main fields with the relevant information. There is a Clear Parse button if the data is unsuitable for parsing.



New Applicant

Register Applicant

You can populate data fields by highlighting items and right-clicking the mouse

Joe Bloggs CMOSH, MIRS, Dip RSA
21 Anywhere Avenue
Anytown
A11 1AA
Mobile: 07525 999000
Home: 01888 999 123
Email: j.bloggs@iqx.com

CAREER SUMMARY

Feb 2019 to Date TClarke (M & E) Working on Framework sites such as BAE
HSEQ Manager

* Regional point of contact for the TClarke business on matters relating to HSEQ management and performance
* Act as a central point of contact on HSEQ systems management, operational teams, sales teams, clients and TClarke Group colleagues; respond to operational queries; contribute to tender and client presentations
* Managed a Health and Safety Advisor covering several sites in North West portfolio
* Prepared monthly and quarterly reports for group and region
* Assessed sub-contractor information and acted as PC on CDM sites

June 2010 to Feb 2019 SODEXO/SAFEWARD
Specialist Safety Executive/UK HSEQ Manager

Working in Defence/Healthcare/Schools and Universities/Prisons and Energy and Resources for facility management across the business.

Enter Applicant details

Division: 123456789012345678901234567890

Known As: Joe Bloggs

Name: Joe Bloggs

Surname: Bloggs

Forenames: Joe

Full Name: Joe Bloggs

Keyname: BLOGGS JOE

State: Pre registration

Available: ☐ Available

Available From: ☐ Personal

HMRC Gender: ☐

Payroll Title: ☐

Date of Birth: ☐

NI Number: ☐

Home Phone: ☐

Day Phone: ☐

Mobile: 07525 999000

E-mail: j.bloggs@iqx.com

Marketing: Un-Subscribed

Payroll Email Address: ☐

Address: 21 Anywhere Avenue, Anytown, A11 1AA

Address: 21 Anywhere Avenue

Town: Anytown

Country: ☐

Postcode: A11 1AA

Source: ☐

Parse CV Load CV < Back Next > Cancel

Populate other fields by highlighting the text on the CV, right clicking the mouse and selecting the destination field.

The following fields can be populated in this way - Surname, Forenames, Full Name, Salutation, Postcode, Country, County, Town, Rest of the address, Date of Birth, Gender, Home Phone, Day Phone, Mobile and e-mail.

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HMRC Gender: ☐

Payroll Title: ☐

Date of Birth: ☐

NI Number: ☐

Home Phone: ☐

Day Phone: ☐

Mobile: 07525 999000

E-mail: j.bloggs@iqx.com

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Payroll Email Address: ☐

Address: 21 Anywhere Avenue, Anytown, A11 1AA

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Town: Anytown

Country: ☐

Postcode: A11 1AA

Source: ☐

Parse CV Load CV < Back Next > Cancel

The right hand side will show the data as it is added.
Thereafter use the Next button and work through the wizard as usual.
You will have the CV on display to help fill in the Questionnaires.



From version 2.20.9 onwards it is also possible to import History for a candidate when you are parsing their CV or highlight the information, right click and select Employment History from the menu. You can link to companies that already exist in IQX and those that don't.

Company	Job Title	Temp	External	From	To	Details
TClarke (M & E) Working on F...	HSEQ Manager	<input type="checkbox"/>	<input checked="" type="checkbox"/>	01/02/2019		* Regional point of contact for the TClarke E
SODEXO/SAFEGARD	Specialist Safety Exec...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/06/2010	28/03/2019	Working in Defence/Healthcare/Schools an
SELF EMPLOYED HEALTH AND	SELF EMPLOYED HEAL...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/06/2009	30/06/2010	SELF EMPLOYED HEALTH AND SAFETY CK
ROTHWELL PLUMBING SERV...	Health and Safety Man...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/01/2005	31/12/2009	Responsible for all Health and Safety matte
ELITE HOMES (NORTH WEST)	Group Health and Safe...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/01/2004	31/12/2005	Responsible for all Health and Safety matte
HOWLEIGH UTILITY SERVICES	Health and Safety / Tral...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/01/2002	31/12/2004	Responsible for the Training of staff in the
BRITISH ARMY	Completed 23 years in t...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/01/1978	31/12/2001	Completed 23 years in the British Army and

Back to [Getting Started](#)

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