

How to Add a New Candidate Record

1/6

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

- NEW button on the Person Selector
- FAST NEW button on the Person Selector
- From a CV
- Directly from the IQX Inbox

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.

gister Applicant	Register Applicant					
u can populate data fields by highlighting items and right-clicking the mouse						
a can populate data needs by highlighting items and right-clicking the mouse	Enter Applicant details or use Parse CV To add an Employment History first right click minimum of Company Name and					
	Division	BR Derby				
	Name	Children of the second s				
	Surname					
	Forenames					
	-Full Name					
	Salutation					
	Keyname					
	State	Pre registration				
	Available					
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	Personal					
	HMRC Gen					
	Payroll Title					
	Date of Birth					
	-NI Number					
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	Mobile					
	E-mail					
	Marketing	Un-Subscribed				
	Payroll Email A.					
	Address					
	Address					
	-					
	Suburb					
	Town					
	-County/City					
	Country					
	Postcode					
	Source					
	Consultant	CATHERNE				
	Registered	Date 01/06/2022				
	Last Updated					

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.



2024/05/22 11:40

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.
Keyname	This is generated from the names that you enter.
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.

2/6

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 Question	s 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.

How to Add a New Candidate Record

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3/6

2024/05/22 11:40

Past New Applicant						
	Enter new Applicant details					
You can populate data fields by highlighting items and right-clicking the mouse	Will create a new minimal	I record registered as Temp in the department.				
	Division	BR Derby				
	Department	Drivers ····				
	Surname					
	Forenames					
	Full Name					
	Keyname					
	Salutation					
	State	Pre registration				
	Available From					
	Gender					
	Date of Birth					
	Home Phone					
	Mobile					
	E-mail					
	Number					
	Date	01/06/2022				
	Address					
	Suburb					
	Town					
	County/City					
	Country					
	Postcode					
Parse CV Load CV		< Back Next > Cancel				

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.

2.21.11+ CV Parse option was added to the Fast New button.

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.





4/6

2024/05/22 11:40

👌 New Applicant				
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You can populate data fields by highlighting items and right-clicking the mous	•	Enter Applicant d	etais	
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Anytown		Name	Joe Bloggs	
A11 1AA		Sumame	Biogga	
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Mobile :07525 999000 Home: 01888 999 123		Full Name	Joe Bloggs	
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run industriations		State	Pre registration	
		EAvailable		
1		Available From		
CAREER SUMMARY		Personal		
		HMRC Gende		
Feb 2019 to Date TClarke (M & E) Working on Framework sites such as BAE		Payrol Title		
		Date of Birth		
HSEQ Manager		N Number		
		Home Phone		-
* Regional point of contact for the TClarke business on matters relating to HSEQ management and performance		Day Phone		
"Act as a central point of contact on HSED systems management and		Mobile	07525 999000	
performance for stakeholders including, senior management, operational		E-mail	i bioggs@igx.com	
teams, sales teams, clients and TClarke Group colleagues; respond to operational queries; contribute to tender and client presentations		Marketing	Un-Subacribed	
"Managed a Health and Salety Advisor covering several sites in North West		Payrol Email Ad		
potiolo.		Address	21 Anywhere Avenue, Anytown, A11 1AA	_
* Prepared monthly and quarterly reports for group and region		Address	21 Anywhere Avenue	
* Assessed sub-contractor information and acted as PC on CDM roles			21 Auguster Contract	
June 2010 to Feb 2019 SODEX0/SAFEGARD		Town	Anytown	
Provide Patrick Provider EWILLIPPO Management		County		
Specialist Safety Executive/UKIJ HSEQ Manager		Country		
Working in Defence/Healthcare/Schools and		Postcode	A11 1AA	
Universities/Prisons and Energy and Resources for full		Source	ATT DAA	
facility management across the business.		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.

🗟 New Applica	nt					
Register Applic	ant			Register Applic	ant	
You can populate	data	fields by highlighting items and right-clicking the mo	ouse	Enter Applicant de	ctais	
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A11 1AA				Sumarre	Bloggs	
				Forenames	Joe	
Mobile :07525 95 Home: 01888 995	4.7.7.			FullName	Joe Bloggs	
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	4	Sumame: Bloggs	- 11	State	Pre registration	
	~	Forenames: Joe	- 84	Available		
	~	Full Name: Joe Bloggs	- 84	Available From		
WREER SUMM	5	Postcode: A11 1AA	- 84	Personal		
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		Coupty:	- 84	Date of Birth		
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ortolio. Prepared nonfri		Home Phone:	- 84	Address	21 Anywhere Avenue, Anytown, A11 1AA	
Assessed sub-ci		Day Phone:	- 84	Address	21 Anywhere Avenue	
	~	Mobile: 07525 999000	- 11			
une 2010 to Feb	~	E-mail: j.bloggs@iqs.com		Town	Anytown	
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Jniversities/Priso acility manageme		Сору	-	Source		_
			F			
Parse CV		Paste			< Dack Beat >	Cancel
		Find	-			

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.



2024/05/22 11:40

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.

5/6

Bire Applicant						
Register Applicant	Campany	July Tille	Temp Exter			Details
Too can populate data fields by highlighting terms and right clothing the mouse	 TClarke (M & C) Workeg on F. 			01/02/2918		*Regional point of contact for the TClarke t
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or Blogg CMODH, MURIAL Dis-RIA	BELF EMPLOYED HEALTH AN			01/10/0008	30/06/2010	INFLE ENFLOYING HEALTH AND EAPETY CO
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aytsin	DUTE HONES MORTH VESTI	Group Health and Safet.		01/01/2004	51/10/20065	Responsible for all Health and Sefety matter
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Directly from IQX Inbox

You can now load a CV into the New Person wizard directly from your inbox in IQX. From here you can parse the CV and create the new person as you normally would from a Word CV or New button. The email has to be visible in your inbox in IQX (in the inbox limit set in IQX). The CV has to be in either TXT, PDF or Docx format. To do this follow these steps.

Find the email that has the CV you want in your IQX inbox and click on Expand.

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SCOTTM	0			1 😰 🔳	Help			
Daily Work List	Expand	Save Message as Contact Event	Reply to Message	Delete Mess	age Filter	scott mo	The Filter Box DOE It only filters the e	S NOT Sear nails airead
Diary	From Scott McHulen			Suit	iject		Received 30/08/2021 15-13	Atta +
Diary List	 Scott Molifuler 	SCOTTINCMULLEN, ABS	ok Lib				30/06/2021 15:13	
Inbox								
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Reporta								
Backup Log 💽	10							•

Click on the required CV / Document to select it. Once you have clicked on the CV to select it click on the 'Add New Person' button.



2024/05/22 11:40



This will load the CV text into the New Person Wizard and allow you to Parse the CV and create the new person.

Back to Getting Started

