

#### Temp Desk

# Temp Desk

If you are a Temp consultant, this view is where you will spend most of your time. Almost everything can be done from this view in relation to Temp vacancies.

| Desk<br>Industrial Driv | View<br>vens v We |         | Year         Week           ∨         2022         2 | Ends     | 16/07/2022           | (Current)             | Proces                  | • 🗳 u                  | pdate Cite           | se <u>H</u> elp        | Consulta             | NEENA    | ¥          |        | , |
|-------------------------|-------------------|---------|--|----------|----------------------|-----------------------|-------------------------|------------------------|----------------------|------------------------|----------------------|----------|------------|--------|---|
| Vacancies<br>Temps      | Search Expand     | Add Sho | w: O Shifts in Week<br>Current State (               | ) Un fil | ed in Week           | Add Shifts Ell        | Shits Confirm           | Shifts Copy S          | inits Enter 1)       | mesheet Fi             | ber                  | Postcode | Miles<br>0 | ÷ Find |   |
| Availability            | Position          | PO Ref  | Company  | Miles    | Monday<br>04/07/2022 | Tuesday<br>05/07/2022 | Wednesday<br>05/07/2022 | Thursday<br>07/07/2022 | Friday<br>06/07/2022 | Saturday<br>09/07/2022 | Sunday<br>10/07/2022 |          |            |        | ł |
| Placements              | Class 1           |         | 10 Group PLC   |          |                      | 1P                    | 1P                      | 1P                     | 1P                   |                        |                      | ·        |            |        |   |
| Vacancy<br>Shifts       | Delivery          |         | A & M Stephens                                       |          |                      |                       |                         |                        |                      |                        |                      |          |            |        |   |
| Shifts                  | Class 1           |         | ABC Contract Servic                                  |          |                      |                       |                         |                        |                      |                        |                      |          |            |        |   |
| Tirresheets             | Driver            |         | ABC Contract Servic                                  |          | 10                   | 10                    | 10                      | 10                     | 10                   |                        |                      |          |            |        |   |
| Cascades                | Driver            |         | ABC Contract Servic                                  |          |                      |                       |                         |                        |                      |                        |                      |          |            |        |   |
| AWR Terros              | HOV               |         | ABC Contract Servic                                  |          |                      |                       |                         |                        |                      |                        |                      |          |            |        |   |
| AWR                     | Class 2           |         | Allonby Limited                                      |          |                      |                       |                         | 30                     | 30                   | 30                     | 30                   |          |            |        |   |
| Checking<br>S Query Log | Delivery          |         | Arrec Services Ltd.                                  |          |                      |                       |                         |                        |                      |                        |                      |          |            |        |   |
|                         | Delivery          |         | Borders  |          | 19                   | 1P                    |                         |                        |                      |                        |                      |          |            |        |   |
| Expiry Dates            | HGV               |         | Borders  |          |                      |                       |                         |                        |                      |                        |                      |          |            |        |   |
| Compliance              | TEST              |         | Borders  |          |                      |                       |                         |                        |                      |                        |                      |          |            |        |   |
| Reports                 | Delivery          |         | Eden Brown Ltd.                                      |          |                      |                       |                         |                        |                      |                        |                      |          |            |        |   |
|                         | Driver            |         | Eden Financial Ltd.                                  |          |                      |                       |                         |                        |                      |                        |                      |          |            |        |   |
|                         | 7.5               |         | Habstead Group PLC                                   |          |                      |                       |                         |                        |                      |                        |                      |          |            |        |   |

## Vacancies

The Temp Desk will automatically open on the Consultants default Temp desk. You can select a different Temp desk from the drop down menu in the top left of the window. From this tab there are several things you can do:

- Expand the Vacancy
- Add a new Vacancy
- Search for a Vacancy by the Company/Client name
- Add shifts to existing Vacancy
- Fill shifts for vacancy
- Confirm shifts this will also send out a notification if you have one set up.
- Copy shifts
- Access the Timesheet for a candidate

You can also filter the Vacancies by those that have Shifts in the week, are in a Current, or have unfilled shifts in the week.

## Temps

In this tab you can view all the Temps for your selected desk, and see what vacancies they are booked into. If you right click on the cell a small window will popup showing you more details about



Temp Desk

the booking. You can access the Person record and the Vacancy record from here by clicking on the option.

| Desk              |      | View                   | 1           | /ear Wee | ek                   |                       |                         |                        |                     |
|-------------------|------|------------------------|-------------|----------|----------------------|-----------------------|-------------------------|------------------------|---------------------|
| Industrial Driv   | /ers | s 🗸 Weekly S           | hift 🗸 2    | 14       | ÷ Ends 10            | 07/2022 (             | Current)                | Process                | Per The State       |
| Vacancies         | S    | earch Expand Holiday F | Pay Current | Pool     | Filter               | 🕐 Ava                 | ilable Unavaik          | able On Holida         | y Add Shi           |
| Temps             |      | 1                      | 1           |          | 1                    | 1                     | 1                       |                        | 1                   |
| Availability      |      | Temp                   | Licences    | Distance | Monday<br>04/07/2022 | Tuesday<br>05/07/2022 | Wednesday<br>06/07/2022 | Thursday<br>07/07/2022 | Friday<br>08/07/202 |
| Placements        |      | Angel Acevedo          |             |          |                      |                       |                         |                        |                     |
| Vacancy<br>Shifts | ▶    | Bilal Aguilar          |             |          | S J Berwin L         | lç S J Berwin Ll      | c S J Berwin Ll         | S J Berwin LI          | s J Berwi           |
| Shifts            |      | Dexter Ball            |             |          |                      | Bilal Aguilar         |                         |                        |                     |
| Timesheets        | -    | Jasper Bean            |             |          |                      | Monday 04/07          | /2022                   |                        |                     |
| Cascades          |      | Calvin Bonilla         |             |          |                      |                       |                         |                        |                     |
|                   | -    | Meena Brock            |             |          |                      | Courgette Poli        | nator, SJ Berv          | /in Llp                |                     |
| AWR Temps<br>AWR  | -    | Grayson Brown          |             |          |                      | Available at tin      | ne                      |                        |                     |
| Checking          | -    | Megan Browning         |             |          |                      |                       |                         |                        |                     |
| 'S Query Log      | -    | Ismaeel Bryan          |             |          | Beale & Co.          | Beale & Co.           | Beale & Co.             | Beale & Co.            | Beale & C           |

Other actions you can perform from this tab are -

- Enter Availability or Unavailability
- Enter Holidays
- Add shifts
- Book Shifts
- Confirm Shifts
- Access the Timesheet

If enabled by your Agency, you can also set the distance in miles from the postcode (vacancy)

## Availability

This view shows you the Candidates Availability, Unavailability and Holidays on your chosen desk. You can view the next month or the previous month. You can also change the candidates status, filter by has availability and NOT working this week. You can also expand the Candidates record from this tab.



Temp Desk

#### 2024/04/20 04:29

🐏 Temp Desk Desk View Year Week Go to Current Ends 09/02/2020 Healthcare Weekly Shift 2019 ≑ 45 ≑ Process  $\sim$ ~ Make Current Candidate Status Departmen NOT Working this week Vacancies Search Expand Count All ~ Health Has Availability Temps Availability Feb Name Miles 2 3 8 9 10 11 5 6 12 15 16 17 18 20 Placements Vacancy Angel Acevedo Shifts Malik Aguirre Shifts Simon Alderman Timesheets Ezekiel Ali AAAAA Cascades Woody Allen Thursday 06/02/20 - Available - 07:00 to 18:00 AWR Temps Ela Alvarez υυυι Thursday 06/02/20 - Available - 07:00 to 18:00 AWR Philippa Alvarez Checking Add Day Availability Lana Andrade TS Query Log Add Day Holiday Rose Baird AAA Expiry Dates Add Day Unavailability Macie Baker Compliance Lawson Ballard Book Shift Reports Henri Barker AAA Confirm Shift Mollie Barrera Enter Timesheet Isobelle Barrett AAA

By right clicking on any populated cell, a new window will pop up giving you more details. From this window you can also add Availability, Unavailability and Holidays. Book shifts, confirm shifts and access the timesheet.

## **Placements**

#### refers to:

temp desk form  $\rightarrow$  placements tab

This is where you manage your group of placed candidates. All contacts can be made and recorded from this view.

In order to save entry time a Placement is not required until a first Timesheet is Completed – IQX takes care of it in the background. This means that looking at the Placement list does NOT show who is working in the week.

If a Placement is needed because a Temp is getting different rates to the Vacancy then from the Vacancy it is possible to early-create the Placement **from the shift view** by clicking the **Placement/Rates** button. **Do not** use the normal method of adding a Placement as it will not see the shift links.

2.22.2+ If set up by your system administrator unavailability entered for a contract temp the reason is now visible on the Placements, Timesheets and Availability views.



4/11

#### 2024/04/20 04:29

Temp Desk

|                           | Expand        | Show: Active in Pe | riod<br>hesheet for Period | Vacar      | <u>nev App</u> | licant       | Enter        | Timeshee  | 5            | <u>iount</u> |              | ] ,          |
|---------------------------|---------------|--------------------|----------------------------|------------|----------------|--------------|--------------|-----------|--------------|--------------|--------------|--------------|
|                           | Position      | Company            | Temp                       | Start Date | Leave Date     | Mon<br>14/02 | Tue<br>15/02 | Wed 16/02 | Thu<br>17/02 | Fri<br>18/02 | Sat<br>19/02 | Sun<br>20/02 |
| 1                         | Staff Ward 2  | Habstead Group PLC | Kubasiewicz, Laura         | 25/01/2021 |                | 7.5          | 7.5          | 7.5       | 7.5          | 7.5          |              |              |
| Contraction of the second | Staff Ward 2  | Habstead Group PLC | Langan, Michelle           | 25/01/2021 |                | 7.5          | 7.5          | 7.5       | 7.5          | 7.5          |              |              |
|                           | Staff Ward 2  | Habstead Group PLC | Neale, Amanda              | 29/03/2021 |                | 7.5          | 7.5          | 7.5       | -            |              | 9            |              |
|                           | Administrator | Vinson & Elkins    | Bemowska, Kamila           | 22/01/2021 |                | HOL          | HOL          | 7.5       | ABST         | 7.5          | U            |              |

The Unavailability reasons will also show on the timesheet in place of the hours, if Show Hours is ticked.

| Search . | Expand Add     | d <u>Yacance Appli</u> s | act Cieals | Comment            | Query         | 2 Count | Fil | ter |     | Docum | ent | Ho Sh | ION<br>AUTS |
|----------|----------------|--------------------------|------------|--------------------|---------------|---------|-----|-----|-----|-------|-----|-------|-------------|
| Number   | Payroli<br>No. | Temp                     | Account    | Company            | Position      | Comment | Mon | Tue | Wed | Thu   | Pri | Sat   | 1 50        |
| V3       | 780 NEW        | Bemowska, Kamila         | V123       | Vinson & Elkins    | Administrator |         | HOL | HOL | 7.5 | ABST  | 7.5 |       |             |
| V3       | 781 NEW        | Gomes, Maria             | XOHA09     | Habstead Group PLC | Staff Ward 2  |         | 7.5 | 7.5 | 7.5 | 7.5   | 7.5 |       |             |
| V3       | 782 NEW        | Kubasiewicz, Laura       | X0HA09     | Habstead Group PLC | Staff Ward 2  |         | 7.5 | 7.5 | 7.5 | 7.5   | 7.5 |       |             |

**Note** Timesheets are generated from this list so it is important to only have current placements on this list.

See also What do the colours mean?

## **Vacancy Shifts**

Here you will see all the filled shifts in the week for each vacancy on your chosen desk. It also shows you the name of the temp that is booked into the shift and the shift description and times. This information can be viewed full by rolling your mouse over the cell.

| Desk<br>Industrial Driv                                  | vers        | View<br>Weekly Shift | Year Wee                | k Ends 04/12/202     | 2 (Curre              |                         | cess 🔓                 | Update               | Close B                | elp                  |
|--|-------------|----------------------|-------------------------|----------------------|-----------------------|-------------------------|------------------------|----------------------|------------------------|----------------------|
| Vacancies  | Search Expa | and Add Cor          | noany Position          | Filter               | Find 2)               | Add Shifts              |                        |                      | Copy Shifts E          | nter Imeshe          |
|  |             |                      |                         |                      |                       |                         |                        |                      |                        |                      |
| Temps<br>Availability                                    | Position    | PO Ref               | Company                 | Monday<br>28/11/2022 | Tuesday<br>29/11/2022 | Wednesday<br>30/11/2022 | Thursday<br>01/12/2022 | Friday<br>02/12/2022 | Saturday<br>03/12/2022 | Sunday<br>04/12/2022 |
| Availability   | Position    | P0 Ref               | Company<br>10 Group PLC |                      |                       |                         | 01/12/2022             | 02/12/2022           |                        |                      |
| Temps<br>Availability<br>Placements<br>Vacancy<br>Shifts | 1.2522.1    | 1.155.075            |                         | 28/11/2022           |                       | 30/11/2022              | 01/12/2022             | 02/12/2022           | 03/12/2022             |                      |

From this tab you can perform a count of the vacancies, confirm shifts, copy shifts, and enter timesheets.



## Shifts

When you click on this tab a new window will open detailing all the shifts for the week on your selected desk. From here you can view each shift in more detail > move the arrow to the shift and all the details will be in the bottom section of the window. You will see several buttons to the left of this section detailing all the tasks you can carry out from this view. This includes, filling shifts, expanding the vacancy, cancelling shifts, expanding the Temp record, cascade, expanding the timesheet, confirm, move shift.

| Nesk<br>ndustrial Dri                                | vers         | i., j                                   | View<br>Weekty St              | and the second se | Veek<br>35 📮 Ends 04/12/2022  | (Current)   | Process                | 14    | Lod   | ate (    | lose Hel    | P           |                 |
|--|--------------|---|--------------------------------|---|---|---|------------------------|-------|-------|----------|-------------|-------------|-----------------|
| /acancies<br>Tempa                                   | 1            | ear                                     | Shifts     Deak Industrial Dr  |   | State   | Confirmed   | Cascade<br>Non-Casca   |       | 2)    | Count    | Process     | and a state | - 10 💌<br>8   8 |
| velability<br>acements                               | _            | Cla                                     | From 28/11/2022<br>Text Filter | ✓ to 04/12/2022   |   |   | Cascadeab<br>Cascaded  | ie:   | File  | r Shifts | Add Shifts  | Buk Can     | cel Unfiled     |
| Vacancy<br>Shifts                                    |              | HG                                      | Тепр                           | Company   | Vacancy   | Cancel Shift details                                      | Date                   | From  | То    | Break    | Description | n Os        | r Ref. Their R  |
| Shifts   |              | Dei                                     | Charile Byrd                   | 10 Group PLC  | Class 1   |   | Mon 28/11              | 06:00 | 17:30 | 60 De    | w.          |             | 26521           |
| mesheets   |              | Cla                                     | Charlie Byrd                   | 10 Group PLC  | Class 1   |   | Wed 30/11              | 18:00 | 05.00 | 60 N     | ght         | 1           | 26522           |
| Cascades   | -            | Drie                                    | Grayson Brown<br>Chris Cross   | 10 Group PLC<br>10 Group PLC  | HGV<br>HGV  |   | Fri 02/12<br>Sat 03/12 | -     | 05:00 | 60 M     |             |             | 26537           |
| STREET, STREET,                                      | 1            | HG<br>Cla<br>De                         |                                |   |   |   |                        |       |       |          |             |             | 8               |
| Checking<br>Query Log<br>piry Dates<br>ompliance     | 1 1 1 1      | Cla<br>De<br>De<br>HG<br>TE<br>De       | _                              |   |   |   |                        |       |       |          |             |             |                 |
| Checking<br>S Query Log<br>xpiry Dates               | al total and | Cla<br>Dei<br>HG<br>TES                 | <br>Details Quick Fill         | Short List Cascade H  | istory Audit Trait Out  |   |                        |       |       |          |             |             |                 |
| Checking<br>S Query Log<br>xpiry Dates<br>Compliance | al total and | Cla<br>De<br>De<br>HG<br>TE<br>De<br>De |                                |   | State   | Provision   | 21 H                   |       |       |          |             |             |                 |
| Checking<br>S Query Log<br>xpiry Dates<br>Compliance | al total and | Cla<br>De<br>De<br>HG<br>TE<br>De<br>De | Details Quick Fill<br>Fill     | Short List Cascade H  | State<br>Temp   | Provision<br>Charlie B                                    | yrd                    |       |       |          |             |             |                 |
| Checking<br>& Query Log<br>kpiry Dates<br>Compliance | al total and | Cla<br>De<br>De<br>HG<br>TE<br>De<br>De | Fil                            | Expand Vacancy  | State<br>Temp<br>Company  | Provision<br>Charle B<br>10 Group                         | yrd                    |       |       |          |             |             |                 |
| Checking<br>& Query Log<br>kpiry Dates<br>Compliance | al total and | Cla<br>De<br>De<br>HG<br>TE<br>De<br>De |                                |   | State<br>Temp<br>Company<br>Vacancy                                 | Provision<br>Charlie B                                    | yrd                    |       |       |          |             |             |                 |
| Checking<br>& Query Log<br>kpiry Dates<br>Compliance | al total and | Cla<br>De<br>De<br>HG<br>TE<br>De<br>De | Fil                            | Expand Vacancy  | State<br>Temp<br>Company<br>Vacancy<br>Cancel Shift details         | Provision<br>Charlie B<br>10 Group<br>Class 1             | yrd<br>) PLC           |       |       |          |             |             |                 |
| Checking<br>S Query Log<br>xpiry Dates<br>Compliance | al total and | Cla<br>De<br>De<br>HG<br>TE<br>De<br>De | Fill<br>Cancel<br>Cascade Now  | Expand Vacancy<br>Expand Temp<br>Expand Timesheet   | State<br>Temp<br>Company<br>Vacancy<br>Cancel Shift details<br>Date | Provision<br>Charle B<br>10 Group                         | yrd<br>) PLC           |       |       |          |             |             |                 |
| Checking<br>S Query Log<br>Xpiry Dates<br>Compliance | al total and | Cla<br>De<br>De<br>HG<br>TE<br>De<br>De | Fill                           | Expand Vacancy<br>Expand Temp   | State<br>Temp<br>Company<br>Vacancy<br>Cancel Shift details         | Provision<br>Charlie B<br>10 Group<br>Cless 1<br>Non 28/1 | yrd<br>) PLC           |       |       |          |             |             |                 |

On the main window you can filter the shifts to narrow down what you are looking for. Add shifts and bulk cancel any unfilled shifts

## Timesheets

This is where you can view your timesheets, create timesheets or add new ones. You can also directly access the Vacancy Record and Person's Record by clicking the corresponding buttons in the top bar menu. By expanding up the timesheet you can complete it ready for invoicing.

# iqx

6/11

#### 2024/04/20 04:29

Temp Desk

| Desk               |           | View           | Visar Week              |                      | Ge te Carrel | -          | and the second second    |           |              |          |          |
|--------------------|-----------|----------------|-------------------------|----------------------|--------------|------------|--------------------------|-----------|--------------|----------|----------|
| Industrial Only of | 15 0      | Weekly Shift   | ○ 2022 ÷ 21 ÷           | Ends 21/08/2822      | Make Curren  |            | Update Close Het         |           |              |          |          |
|                    |           |                |                         | 51                   |              |            | 0                        | (insert   | the strength |          |          |
| Vacances           | Search Do | bbà bnei       | Vacancy Candidate       | Create               | Corement     | t Grey     | 2) Count                 | Filler De | coment Show  |          |          |
| Torps              |           |                |                         |                      | -            |            |                          |           | HOLE         |          |          |
| Availability       | dia.      |                | Paid to - Ref and tiene |                      | ayrus<br>No  | Account    | 1                        |           |              | Departon | Dispetch |
|                    | Number    | DIRCH + PU RET | Fed to - xer and taine  | Hereb Trees          | No.          | Татр Соов  | Company                  | Position  | Comment      | Date     | Hethod   |
| Pacements          | 8111      | 1              | 1 Shift                 | Industrial D 500     | 89 Lolly C   | therry 813 | Allonby Limited          | Class 2   |              |          |          |
| Vacancy<br>Stylts  | 8072      | 0+             | Exchequer Solutions     | Industrial Dry 502   | 12 Hade C    | ABC001     | ABC Contract Services Ed | HOV.      |              |          |          |
| Theta              | 608-      | 9-23           |                         | Industrial Dry 500   | SS Chris Cr  | 1010101    | Borders                  | Delvely   |              |          |          |
| Timesheets         | 60.66     | Q.,            |                         | kioustrial Driv 500  | 95 Jack Fri  | 16f 480001 | ABC Contract Services Ed | Driver    |              |          |          |
|                    |           | 0+3322         | -                       | Industrial Driv 000  | 04G Charle   | Berd II    | 10 Group PLC             | Class 1   |              |          |          |
| Cascadas           | 8467      | 10+9006        |                         | a state of the state | the second   |            |                          |           |              |          |          |

## **AWR Temps & AWR Checking**

The Temp Desk has two new views - AWR Temps and AWR Checking. These have to process a LOT of information so can be slow to load.

#### **AWR Temps**

This view shows the current roles for the Temps registered with the desk.

The default view is to check the roles that have 11 weeks of qualification. This can be changed to look at less weeks of qualification or to look at the gap since the last timesheet.

After six weeks of gap, the role reverts to Unqualified State with a Qualifying count of 0.

| Temp Desk  |             |                  |            |              |                       |              |           |             |       |               |               |             |
|--|-------------|------------------|------------|--------------|-----------------------|--------------|-----------|-------------|-------|---------------|---------------|-------------|
| Desk<br>AWR Contract   | New         | View<br>Veekly C |            | ear<br>D11 🌲 | Week<br>34 🚔 Ends 27/ | /11/2011     | (Current) | Pr          | 00813 | <u>Update</u> | Close         | <u>Help</u> |
| Vacancies  | Expand      | Placement        | Applicant  | Gap          | or Qual Qual          | Wks >=     I | 1 - 0     | ther Agency | Work  | Report        | Show Weekly   | / Details   |
| Temps  | A           | pplicant         | AWR Status | Linked       | Company               | J            | ob Title  | Weeks       | Gap G | arade Spe     | ciality Rates | l           |
| Placements   | 🕨 Kevin Dru | mmond            | AWR Appli  | 1            | AWR Applies           | Secret       | tary      | 4           | 3     |               | Y             | 1           |
| The second s | Stuart Hu   | mphries          | AWR Appli  |              | AWR Applies           | ASA T        | est       | 1           | 4     |               |               |             |
| Timesheets   | Simon Jo    | nes              | AWR Appli  |              | AWR LK2 Applies       | Secret       | tary      | 6           | 0 L   |               | Y             |             |
| AWR Temps  | Rob McA     | llister          | AWR Appli  |              | AWR Applies           | Secret       | tary      | 3           | 0     |               | Y             |             |
| NR Checking  | Rob McA     | llister          | AWR Appli  |              | AWR LK1 Applies       | pa           |           | 3           | 0     |               |               |             |
| inclusion g  | Bob Mod     | lister           | AWR Appli  | 1            | AWR LK2 Applies       | PA           |           | 6           | 0     |               | Ý             |             |

The example is showing candidates with at least one week's qualifying but in practise it should be used to see who is coming up to qualifying to ensure all the details are set up and correct.

The Show Weekly Details button will list the events that count towards qualifying and pausing the gap. Other Agency Work can also be entered from here - **make sure to choose the correct role that it is to be entered for before clicking the button.** 

#### **AWR Checking**

This view shows the AWR information for Companies, Vacancies and AWR Roles (which can encompass several Placements). You can filter to just one type. The dates refer to the checked date and information can always be updated from this view.



| Temp [ | Desk |
|--------|------|
|--------|------|

| 🐻 Temp Des          | ik                      |  |                         |                  |               |           | • %         |
|---------------------|-------------------------|--|-------------------------|------------------|---------------|-----------|-------------|
| Desk<br>AWR Contrac | t New View<br>Weekly Co | Year Week<br>mitract v 2011 1 34 1 End | ts 27/11/2011 (Current) | Process          | <u>Update</u> | Close     | <u>Help</u> |
| Vacancies           | Expand Placement        | Applicant Gap or Qual Qual             | • Wks>= 1 • 0           | ther Agency Work | Report Sh     | ow Weekly | Details     |
| Temps               | Applicant               | AWR Status Linked Comp                 | any Job Title           | Weeks Gap        | Grade Special | ity Rates |             |
| Placements          | Kevin Drummond          | AWR Appli 🔽 AWR Applies                | s Secretary             | 4 3              |               | Y         |             |
| Timesheets          | Stuart Humphries        | AWR Appli  AWR Applies                 | ASA Test                | 1 4              |               |           |             |
| Imesneets           | Simon Jones             | AWB Appli 🗌 AWB LK2 Ap                 | plies Secretary         | 6 0              | L             | Y         |             |
| AWR Temps           | Rob McAllister          | AWR Appli 🗌 AWR Applies                | s Secretary             | 3 0              |               | Y         |             |
| WR Checking         | Rob McAllister          | AWR Appli 🗌 AWR LK1 Ap                 | plies pa                | 3 0              |               |           |             |
| inter checking      | Rob McAllister          | AWR Appli & AWR LK2 Ap                 | olieo PA                | 6 0              |               | Ý         |             |

## **Expiry Dates**

The Temp Desk has an Expiry View which shows all Date Criteria/Skills/Questions that have been set up with a number of 'Lead' days to expiry. This should be used to initiate bulk communications with the Temps needing updating. In order to appear in this view a question needs to be a date question and have a lead time entered:

|       |      |               |                                  |                    |                | Ca       | ndidate  | Quest | ionnaire       | 9 (P)    |                |            |          |                      |                      |                |                     | loli        |     |
|-------|------|---------------|----------------------------------|--------------------|----------------|----------|----------|-------|----------------|----------|----------------|------------|----------|----------------------|----------------------|----------------|---------------------|-------------|-----|
| Que   | stic | ons A         | dil Delete Units Restore Deleted | Filter             | The            | de Droie | Ford Ca  | NUT 1 | implance l     | Vessages | Exery          | Excluded 1 | Stature  |                      |                      |                |                     |             |     |
| Order | -    | Duestion<br>E | Gueston Description              | Тури               | Me Step<br>Scs | 2+84     | Required | Group | Word.<br>Graap | Audt     | Web<br>Publish | Web        | Search . | fiseding<br>Collepse | Reading<br>Acativata | Expiry<br>Lead | Expiry<br>Behaviour | ExplyStatue | Ret |
|       | 143  | 43            | 0                                | reading            | 1              |          | 0        |       | 1              | 6 🖸      | 0              | 0          | 0        | 0                    | 0                    | -              |                     |             |     |
| 1.1   | 141  | 17            | reget to troom                   | Single Selection   |                |          | 0        |       | 12             | R 🗆      |                |            |          | 0                    | 0                    |                |                     |             |     |
|       | 142  | RTW           | Hight to Hork Type               | Single Selection   |                |          |          |       | 1              | e: 🖸     |                |            | Ð        | 0                    | 0                    | 1              | 1                   |             |     |
|       | 144  | RSC           | Right to Hork Enare Code         | Text               |                | 8        | 0        |       | 1              | 0        |                |            |          | 0                    | 0                    | 1              | 1                   |             |     |
|       | 140  | 875           | Aight to Hork Expry              | Cate .             |                |          |          |       | 1              | 0 0      |                |            |          | 0                    | 0                    | 1              | S Warring           | C.P.R.Z     |     |
|       | (58) | 06            | ID Shows                         | Rulliple Selectore |                |          |          |       | 1.             | 0        |                |            |          | 0                    | 0                    | -              |                     |             |     |
|       | 152  | RPN           | Passpot Number                   | Text               |                |          | 0        |       |                | 0 17     |                | 10         | 171      | C3.                  | 0                    |                |                     |             |     |

#### **Expiry Dates View Features**

If the date is in the future by more days than the lead number, the date is in **Black** If the date is in the future by fewer days than the lead number, the date is in **Blue** to show it's nearing expiry.

If the date is in the past, the date is in **Red** to show that it has expired.



Der Ind

Ca

O TS C Exu

| 0 04:29                 |                 |  |                     |        |                           |                              | 8                                | /11                                   |                           |  |                                 |                                    |                                    | Te  |
|-------------------------|-----------------|--|---------------------|--------|---------------------------|------------------------------|----------------------------------|---------------------------------------|---------------------------|--|---------------------------------|------------------------------------|------------------------------------|---|
| Temp Desil              |                 |  |                     |        |                           |                              |                                  |                                       |                           |  |                                 |                                    |                                    |   |
| eni<br>dustral Shift    | Varw<br>View    | CARDON CONTRACTOR OF |                     | 2022   | (Cun                      | rent;                        | Process                          | in State                              | e Close                   | Teb                                      | l                               |                                    |                                    |   |
| acascies<br>Temps       |                 | Current Pool Count   | Terros to Sho<br>Al | *<br>  | 0                         | ear Column Fi                | her Al                           | ele states                            | Workin                    | g Filter<br>rel.                         |                                 | cartments<br>dustrial              | U Sho                              | w Dept.<br>stions                           |
| valutility<br>scienaita | Name            | adact  | Custom Column       | before | Shifts<br>after<br>Expiry | Licence<br>Expiry<br>Lead 90 | Mandatory<br>training<br>Lead 30 | Right<br>to<br>Work Expity<br>Lead 45 | Visa<br>Expity<br>Lead 60 | Annual<br>Appraisal<br>Expiry<br>Lead 30 | CV<br>Espity<br>Date<br>Lead 30 | Ref<br>1<br>Expiry Date<br>Lead 30 | Ref<br>2<br>Espity Date<br>Lead 30 | Compliance<br>override<br>Expiry<br>Lead 30 |
| /scancy<br>Shifts       | Sophie Anderson |  | PA77 6/8            | -434   | 0                         | 30/08/2021                   |                                  | 31/03/2022                            |                           |  |                                 | 31/12/2021                         | -                                  |   |
| Shifts                  | Dexter Ball     |  | E5 8PU              | -465   | 26                        | 30/08/2021                   |                                  |                                       |                           |  |                                 |                                    |                                    |   |
| esheets                 | Loly Dheny      |  | SW12 0/Y            | 2520   | 0                         |                              |                                  | 01/01/2023                            |                           |  |                                 | 01/11/2029                         |                                    |   |
| scates                  | Dexter Choi     | Check expiry dates   | KT234DH             | -1108  | 0                         | 26/11/2019                   |                                  | 07/11/2019                            |                           |  |                                 |                                    |                                    |   |
| R Terres                | San Code        | 1  | MHT 1MH             | 345    | G                         | 18/11/2023                   |                                  |                                       |                           |  |                                 |                                    |                                    |   |
| WR                      | Rex Convey      |  | LL48 6PL            | 367    | 0                         |                              |                                  |                                       | 10/12/2023                |  |                                 |                                    |                                    |   |
| ecking                  | Chais Cross     | 3  | TD1 1TD             | 935    | 0                         | 30/06/2025                   |                                  |                                       |                           |  |                                 |                                    |                                    |   |
| lawry Log               | Enta Data       |  | EH4545EH            | 185    | 0                         | 11/06/2023                   |                                  |                                       |                           |  |                                 |                                    |                                    |   |
| iry Dates               | Jack Front      | 1  | EC4V 3PD            | 1399   | 0                         | 17/09/2029                   |                                  | 10/01/2029                            |                           |  |                                 | 07/10/2026                         |                                    |   |
| spience                 | Haris Greene    |  | PH31-44H            | -3062  | .12                       | 01/07/2014                   |                                  |                                       | 15/03/2025                |  |                                 |                                    |                                    |   |
| eports                  | Piper Gillin    | -  |                     | 1086   | 0                         | 28/11/2025                   |                                  |                                       |                           |  |                                 |                                    |                                    |   |
| 0.000                   | Lola-Rose Mayer |  | M33.5H5             | -1997  | 52                        | 20/06/2017                   |                                  |                                       | 21/03/2023                |  |                                 |                                    |                                    |   |
|                         | Jamie Montes    |  | BD2311Z             | -310   | 0                         |                              |                                  |                                       | 01/02/2022                |  |                                 |                                    |                                    |   |
|                         | Abigal Roman    | Construction AND Industrial  | DA10 OLN            | 136    | 0                         |                              |                                  |                                       | 23/04/2023                |  |                                 |                                    |                                    |   |
|                         | Daity Scheteder |  | 1526 85D            | -895   | Ó                         |                              |                                  |                                       | 26/06/2020                |  |                                 |                                    |                                    |   |

To see just the Candidates who have a date due to expire or already expired click on the 'Temps to Show' and select **Expired and Expiring** from the dropdown.

| Desk<br>Industrial Shift              | fla             |                          | 8 0 Ends 06/0                   | 3/2022 | (Can | emb                          | Process                          | Cal Book                              | a Cose                   | 1940-                                    |                                 |                                    |                                    |   |
|---------------------------------------|-----------------|--------------------------|---------------------------------|--------|------|------------------------------|----------------------------------|---------------------------------------|--------------------------|--|---------------------------------|------------------------------------|------------------------------------|---|
| Vecencies                             | Search Expand   | Current Pool Court       |                                 |        | J    | ar Column Fi                 |                                  | ite states                            | · · · Working            |  |                                 | partments<br>Sustrial              |                                    | w Dept.<br>estions                          |
| Availability<br>Placements<br>Vacancy | Name            | alert                    | C Expired<br>Expired<br>Expired |        | ater | Licence<br>Explay<br>Lead 90 | Mandatory<br>training<br>Lead 30 | Right<br>to<br>Work Expiry<br>Lead 45 | Vice<br>Expey<br>Lead 60 | Annual<br>Apprecial<br>Expire<br>Lead 30 | CV<br>Expiry<br>Date<br>Lead 30 | Ref<br>1<br>Explay Date<br>Lead 30 | Ref<br>2<br>Expiry Date<br>Lead 30 | Compliance<br>override<br>Expiry<br>Lead 30 |
| Shifts                                | Sophie Anderson | 12                       | PA77648                         | -434   |      | 30/09/2021                   |                                  | 31/03/2022                            |                          |  |                                 | 31/12/2021                         |                                    |   |
| Shifts                                | Devter Ball     |                          | E5 8PJ                          | -465   | 26   | 30/08/2021                   |                                  |                                       |                          |  |                                 |                                    |                                    |   |
| inesheets                             | Lolp Cheny      | Contraction of the state | SW120/Y                         | 2520   | 0    |                              |                                  | 01/01/2023                            |                          |  |                                 | 01/11/2029                         |                                    |   |
| Cascades                              | Deuter Dhoi     | Check expiry dates       | KT23 40H                        | -1109  | 0    | 25/11/2019                   |                                  | 67/11/2019                            |                          |  |                                 |                                    |                                    |   |
| WR Temps                              | Hasis Ereene    |                          | PH31 4AH                        | -3082  | 12   | 01/07/2014                   |                                  |                                       | 15/03/2025               |  |                                 |                                    |                                    |   |
| AWR                                   | Lois-Rose Mayer |                          | M335H5                          | -1997  | 52   | 20/06/2017                   |                                  |                                       | 21/03/2023               |  |                                 |                                    |                                    |   |
| Checking                              | Janie Montes    |                          | BD23 1TZ                        | 310    | Ð    |                              |                                  |                                       | 01/02/2022               |  |                                 |                                    |                                    |   |
| S Query Lag                           | Dairy Schroeder |                          | TS26.85D                        | -885   | 0    |                              |                                  |                                       | 26/06/2020               |  |                                 |                                    |                                    |   |

To filter to just one type of Expiry Date - e.g. Visa Expiry - click on the column header. Only Temps with a date in that column will now show. All their other dates also remain in view.

| esk<br>idustrial Shi | ta 🗸 View       |                             | <ul> <li>Enda 06/83</li> </ul> | 12022                    | (Cun                    | rent)                        | Process                         | in the state                          | te Close                 | <u>H</u> eb                              |                                 |                                   |                                    |  |
|----------------------|-----------------|-----------------------------|--------------------------------|--------------------------|-------------------------|------------------------------|---------------------------------|---------------------------------------|--------------------------|--|---------------------------------|-----------------------------------|------------------------------------|--|
| lacencies<br>Terque  | Search Expand   | Current Post                | Temps to Sho                   |                          | 0                       | ear Column Fi                | ter Al                          | ate states                            | - Differition            |  |                                 | oartreints<br>Justriel            |                                    | iw Dept.<br>selione                          |
| acenents             | Nane            | det                         | Custom Column                  | Days<br>before<br>Expiry | Shihs<br>after<br>Expry | Licence<br>Expiry<br>Lead 90 | Mandstory<br>baining<br>Lead 30 | Right<br>to<br>Work Expres<br>Lead 45 | Visa<br>Expey<br>Lead 60 | Armuel<br>Apprecial<br>Exprey<br>Lead 30 | CV<br>Expiry<br>Date<br>Lead 30 | Ref<br>1<br>Expry Date<br>Lead 30 | Ref<br>2<br>Expiry Date<br>Lead 30 | Compliance<br>override<br>Expiry<br>Level 30 |
| Vacancy<br>Shifts    | Rex Coresay     | 1                           | LL48 6PL                       | 367                      | 0                       | 8 1                          |                                 |                                       | 10/12/2023               |  |                                 |                                   |                                    | 1111111111                                   |
| Shifts               | Harix Greene    | 10 S                        | PH31 44H                       | -3082                    | 12                      | 01/07/2014                   |                                 |                                       | 15/03/2025               |  |                                 | -                                 |                                    |  |
| nesteets             | Lola-Rose Mayer | 17 2                        | M33 5H5                        | -1957                    | 52                      | 20/06/2017                   |                                 |                                       | 21/03/2023               |  |                                 |                                   |                                    |  |
| ascades              | Janie Hontes    |                             | 8D2017Z                        | -310                     | 0                       |                              |                                 |                                       | 01/02/2022               |  |                                 |                                   |                                    |  |
| R Temps              | Abigal Roman    | Construction AND Industrial | DA10 OLN                       | 136                      | 0                       |                              |                                 |                                       | 23/04/2023               |  |                                 |                                   |                                    |  |
|                      | Daity Schoeder  |                             | T526 85D                       | -895                     | 0                       |                              |                                 | 1                                     | 26/06/2020               |  |                                 |                                   |                                    |  |



To clear this selection click on the **Clear Column Filter** button.

To include non-current Temps such as pre-registered or not active select the radio button for **Entire Pool.** 

| Tomp Desk                 | č.           |                             |                                    |                                      |                 |                             |  |
|---------------------------|--------------|-----------------------------|------------------------------------|--------------------------------------|-----------------|-----------------------------|--|
| Desit<br>Industrial Shift | nu v V       | ew<br>Neekly Shift 🔍 🖓      | Year Week<br>2022 💠 35 💠 Ends 04/1 | 2/2022 Ge to Current<br>Hake Current | Process Lipdate | Close Help                  |  |
| Vacancies<br>Tempe        | Search Expan | Current Pool<br>Entire Pool | Count Al                           | ew 🔑 Ciear Colum                     | n Filter All    | Working Filter<br>this week | Decentments<br>Industrial Stew Dept<br>Cuestions |

To search for a Temp by name you can use the Search button. A window will pop up where you can search for the Temp by name.

| Desk<br>Industrial Driv               | ers view        |                         | Vear Week<br>↓ 2022 + 22 + f | inds 04/09/2022 (Curr | ent) Process          | LE Upda       | te Close                   | Help                                     | 9                 |
|---------------------------------------|-----------------|-------------------------|------------------------------|-----------------------|-----------------------|---------------|----------------------------|--|-------------------|
| Vacancies<br>Temps                    | Search Expand   | Current P<br>Entire Poo | Count .                      | nps to Show           | sar Column Filter All | didate states | _ O Working                |  | 2                 |
| Availability<br>Placements<br>Vacancy | Name            | 1                       | Search for Temp              |                       | 17                    |               | < Visa<br>Expiry<br>sad 60 | Annual<br>Appraisal<br>Expiry<br>Lead 30 | Exp<br>Da<br>Leas |
| Shifts                                | Sophie Anderson |                         | 4                            |                       |                       |               | - 8                        |  |                   |
| Shifts                                | Dexter Ball     |                         | Surname                      | Forenames             | Payroll No.           | Batch + PO F  |                            |  |                   |
| Timesheets                            | Grayson Brown   |                         | Anderson                     | Sophie                | 111                   |               | 38/2024                    |  |                   |
| Cascades                              | Stephen Brown   | Reliven 1               | Ball                         | Dexter                | 50229                 |               |                            |  |                   |
| Consume Volt                          | Loly Cherry     |                         | Brown                        | Grayson               | 50288                 |               | 1                          |  | -                 |
| AWR Temps                             | Dexter Choi     | Check ei                | Brown                        | Stephen               | 50291                 |               | -                          |  | -                 |
| AWR                                   | Rex Conway      |                         | Cherry                       | Lolly                 | 50289                 |               | 12/2023                    |  | -                 |
| S Query Log                           | Chris Cross     |                         | Choi                         | Dexter                | 000325                |               |                            |  | -                 |
| Expiry Dates                          | Enta Data       |                         | Conway                       | Rex                   | 00033C                |               | -                          |  |                   |
| Compliance                            | Jack Frost      |                         |                              |                       |                       |               | -                          |  | -                 |
| a Sherran                             | Haris Greene    |                         | Help                         |                       | V QK                  | × Cancel      | 13/2025                    |  |                   |
| Reports                               |                 | -                       | 10                           |                       | and the second        | - Curicor     | 13/2025                    |  | -                 |
|                                       | Piper Griffin   | _                       |                              |                       | 26/11/2025            |               |                            |  |                   |
|                                       | Lola-Rose Mayer |                         | M33                          | 5HS 1998 52           | 20/06/2017            |               | 21/03/2023                 |  |                   |

To make an individual contact event to send an email or write a letter. Click on the line once to select the Temp - then use the **Make Contact Event** button or **F2** to bring up the Contact Event window.

| /20 04:29                |                 |                    |                   |                |                 | 10/11       |                 |                 |   | Ten          |
|--------------------------|-----------------|--------------------|-------------------|----------------|-----------------|-------------|-----------------|-----------------|---|--------------|
|                          |                 | <b>1</b>           |                   | 0              |                 | 8           |                 | 🤹 🔍 (           | 3 📲   |              |
| - Timp Deck              |                 |                    | 100 V 10          |                | 1               |             |                 |                 |   |              |
| Deak<br>Industrial Drive | ors View        |                    | ₩eet<br>‡ 22 ‡ En | 44.54.09/2022  | (Carrent)       | Process 6   | Update          | Close Help      |   |              |
| industrial brind         | · · ·           | aver aver          | 14   44   4   Di  | IN PROPERTY.   | (or and         |             | gran .          | Crime Deb       |   |              |
| Vacancies                | Sume I Summe    | Curre S Pool       | Тепр              | s to Show      | 1               | Candidate   | states          | Workins Filter  | Departments   | Show         |
| Terros                   | Search Expand   | C Entire Pool      | Contact E         | ent Sophie And | erson           |             |                 |                 | 100   | CI- CON DECK |
| Availability             | 1               | 1                  |                   |                | Reports         | Delete      | Help 🗐          |                 | The second se |              |
| Contraction of the       | Name            | alert              | нери              |                |                 | Uelese      | nep 🖓           | 83              |   | 10           |
| Placements<br>Vecancy    |                 |                    | Text              | A STATE        | Sophie Anderson |             |                 | ElSophie        |   |              |
| Shifts                   | Sophe Anderson  |                    | Letter Text       | and al         | MEENA.          |             |                 | Mobile          | 07700 991 621   |              |
| Shifta                   | Dexter Ball     |                    | Questionnaire     |                | 09/12/2022      |             |                 | E-mail          | Sophie_Anderson@icp   | demo.c       |
| Timesteets               | Grapson Brown   |                    | Emailing          | Time           | 09.57           |             |                 |                 |   |              |
| Cascades                 | Stephen Brown   | Reliven The Brief  | connerad          | Туре           | 1               |             |                 |                 |   |              |
| AVR Temps                | Loly Cheny      |                    |                   | Summary        | 1               |             |                 |                 |   |              |
| AWR                      | Dester Choi     | Check explay dates |                   | Outcome        | 2               |             |                 |                 |   |              |
| Checking                 | Rex Consease    |                    |                   | Calbock        |                 |             |                 |                 |   |              |
| TS Query Log             | Chris Cross     |                    |                   | Calibrath Time |                 |             |                 |                 |   |              |
| Expry Dates              | Enta Data       |                    |                   | Reply as Text  | insert Text     | Spell Check | OvpRoste        | Convert to HTML |   |              |
| Compliance               | Jack Frost      |                    |                   | Send Text      | Write Letter    | Send E-mail | Reply to E-mail |                 |   |              |
| Reports                  | Haris Greene    |                    |                   |                |                 |             |                 | 1               |   |              |
|                          | Piper Grittin   |                    |                   |                |                 |             |                 |                 |   |              |
|                          | Lola-Rose Mayer |                    |                   |                |                 |             |                 |                 |   |              |
|                          | Isaac Pineda    |                    |                   |                |                 |             |                 |                 |   |              |
|                          | Daity Schroeder |                    |                   |                |                 |             |                 |                 |   |              |
|                          |                 |                    |                   |                |                 |             |                 |                 |   |              |

#### To send emails or print letters in bulk - Mail Merge

Use the **Process** button to take all the visible records to the **Person Selector** or select by holding CTRL and click on the required records to process only the selected records to the selector. From the **Person Selector** use the Mail Merge view to write the email/letter to the Temps.

## Compliance

If compliance domains are set up by the Agency a summary of the states for all Temps in the Temp Desk can be seen on the Compliance view.



#### Temp Desk

| Desk<br>Industrial Driv  | vere       | View<br>Weekly Shift |                   | Week<br>22 💠 Ends 04/0      | 9/2022 (Curre     | nt)          | Process 🚑 Update (               | Close 1 | <u>t</u> elp          |
|--|------------|----------------------|-------------------|-----------------------------|-------------------|--------------|----------------------------------|---------|-----------------------|
| Vacancies<br>Temps   | Expand     | Compliance<br>All 🗸  | Behaviour<br>Al 🗸 | Current Pool<br>Entire Pool | Working this week | Filter       | Candidate Status<br>Al           |         | partments<br>Sustrial |
| Availability   | 1          | Name                 | Status            | Score %                     | Com               | pliance Falu | res and Warnings. Expand for Det | talis   | 1                     |
| State State  | Judith Wor | odstone              | Current           | 100                         |                   |              |                                  |         |                       |
| Nacements  |            |                      | 4                 |                             |                   |              |                                  |         |                       |
| Vacancy<br>Shifts  |            |                      |                   |                             |                   |              |                                  |         |                       |
|  |            |                      |                   |                             |                   |              |                                  |         |                       |
| Shifts   |            |                      |                   |                             |                   |              |                                  |         |                       |
| Shifts   |            |                      |                   |                             |                   |              |                                  |         |                       |
| Shifts<br>Timesheets   |            |                      |                   |                             |                   |              |                                  |         |                       |
| Shifts<br>Timesheets   |            |                      |                   |                             |                   |              |                                  |         |                       |
| Shifts<br>Timesheets<br>Cascades<br>WR Temps                                   |            |                      |                   |                             |                   |              |                                  |         |                       |
| Shifts<br>Timesheets<br>Cascades<br>WR Temps<br>AWR                            |            |                      |                   |                             |                   |              |                                  |         |                       |
| Shifts<br>Timesheets<br>Cascades<br>AWR Temps<br>AWR<br>Checking               |            |                      |                   |                             |                   |              |                                  |         |                       |
| Shifts<br>Timesheets<br>Cascades<br>WR Temps<br>AWR<br>Checking<br>S Query Log |            |                      |                   |                             |                   |              |                                  |         |                       |
| Shifts<br>Timesheets<br>Cascades<br>AWR Temps                                  |            |                      |                   |                             |                   |              |                                  |         |                       |

By default you will see Temps that are working in the week, but you can see all Temps in the desk by unticking the **Working this Week** box.

**Expand** will open the Temps record. If any expiry dates are expired or expiring, you will get a list of these in the final column. Again from here you can make individual contact events or process Temps to send a Mail Merge.

#### Reports

Here you will find all the reports that are linked to the Temp Desk. These are usually reports that require their data to be pulled from the timesheets or shifts. To run the required report, click on the line once to select then click on open. The report will either prompt you to make a further selection i.e. a date range, or it will open immediately using the information from the week you have selected on the Temp Desk.

From: https://iqxusers.co.uk/iqxhelp/ - **iqx** 

Permanent link: https://iqxusers.co.uk/iqxhelp/doku.php?id=quick\_guides\_22

Last update: 2022/12/09 11:07

